

# NONPROFIT ORGANIZATIONS INSTITUTE

## LIFECYCLE OF PRIVATE FOUNDATION ENGAGEMENT AND COMPLIANCE CONCERNS

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# INTRODUCTIONS

PART I:  
START-UP CONSIDERATIONS –  
LAUNCHING A PRIVATE FOUNDATION

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## Start-Up Considerations

- Should a private foundation be established?
  - Counseling considerations
  - Alternative and complementary philanthropic structures

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## Start-Up Considerations (cont'd)

- What relationships will the private foundation have with insiders?
  - Identifying DQPs
  - Understanding and structuring transactions to avoid self-dealing

## Start-Up Considerations (cont'd)

- How, when and with what assets will the private foundation be funded?
  - Understanding distribution requirements
  - Understanding investment restrictions
  - Planning for compliance

Also available as part of the eCourse

[2022 Nonprofit Organizations eConference](#)

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39<sup>th</sup> Annual Nonprofit Organizations Institute session

"Lifecycle of Private Foundation Engagement and Compliance Concerns: PART 1"