2011 Issues in Philanthropy:
Stay Informed to Stay on Top

Principles for strategic and accountable gifts, good governance, and ethical philanthropy

Do you have a private foundation or are you considering creating a foundation?

PLEASE JOIN US FOR THIS FREE SEMINAR

WEDNESDAY | APRIL 27, 2011

5:30-7:30 pm

COCKTAIL EVENT AT KORN HALL

UCLA ANDERSON SCHOOL OF MANAGEMENT

Special thanks to UCLA Office of Planned and Major Gifts & UCLA Anderson School of Management for hosting this event.

This event is being co-sponsored by:

MorganStanley SmithBarney

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MHM Mayer Hoffman McCann P.C. An Independent CPA Firm

Morgan Stanley Smith Barney, LLC member SIPC.
Darya Allen-Attar, Financial Advisor, Branch 241
1453 3Rd St, Ste 200, Santa Monica, CA 90401 (310) 319-5211

ABOUT THE PROGRAM

Please join us as we discuss current issues and topics including:

- Philanthropy without liability
- Philanthropy with a culture of accountability and transparency
- Good financial stewardship and financial transparency
- Collaboration - a foundation strategy
- Sustainable and accountable gifting

PARKING INFORMATION: Please see the map and directions at the bottom of this invitation.

AGENDA

5:30-6:00 pm
Cocktails and Networking

Program begins at 6:00 pm:

Welcome and Opening Remarks
David F. Wolf, Ph.D., Executive Director
UCLA, Office of Planned and Major Gifts

Introductions
Cheryl Calhoun, Managing Director
Tax & Business Management, CBIZ MHM, LLC

Maximizing Your Philanthropy Without Liability
Leah Bishop, Partner
Loeb & Loeb LLP

Accountable Philanthropy: Strategy is Key
Gwen Walden, Principal
Walden Philanthropy Advisors (WPA)

Planning for Good Times and Bad:
Good Stewardship of Your Investment Dollars
Darya Allen-Attar, Financial Advisor
Morgan Stanley Smith Barney

7:15-7:30 pm Q&A and Closing Comments

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OPENING REMARKS & INTRODUCTIONS

DAVID F. WOLF, Ph.D.
Executive Director, UCLA, Office of Planned and Major Gifts

David Wolf currently serves as Executive Director for Planned and Major Gifts at UCLA, leading both complex and progressive efforts to integrate and expand major gift opportunities through strategic gift planning and other major gift initiatives.

Prior to UCLA, Wolf served as Vice President for Advancement at the University of Southern Mississippi where he reorganized the university's advancement office and led the campus to all time highs in dollars raised, donor participation, and alumni participation. Wolf also served at the University of Alabama as Assistant Vice President for Development where he helped lead the university's $500 million capital campaign, and has worked at the University of Texas at Arlington, Cameron University (University of Oklahoma System), and the University of Texas Southwestern Medical Center at Dallas.

Wolf received a B.A. in Communication and M.A. in Political Science from the University of Texas at Arlington, and the Ph.D. in Higher Education from the University of North Texas. A California native, Wolf recently returned to his childhood home of Los Angeles after living in the southern United States for more than 20 years. With his very "southern" wife and kids, the Wolf family continues to adjust to and enjoy the California culture and lifestyle.

CHERYL A. CALHOUN
Managing Director, Tax & Business Management, CBIZ MHM LLC

Cheryl specializes in business management, business consulting, tax, and financial planning for small and medium-sized businesses and high income and/or net worth individuals. Cheryl has practiced for over 25 years and her expertise includes all facets of the entertainment industry, with a particular emphasis in film and television. She represents talent, production companies, entertainment service companies, media service companies, publishing companies and executives in varied tax and business matters.

Her range of services include: outsourcing of chief financial officer duties including the provision of day-to-day supervision of finance and accounting decisions and transactions; contract negotiation and review; production, domestic and international distribution, and participation accounting; guild compliance; development of equity and debt financing plans; executive compensation planning; state and local sales, use, business tax planning, compliance and controversy; domestic and international income tax planning, compliance and controversy; business valuations; employee benefits; etc.

Prior to joining the firm, Cheryl spent four years in the audit and tax departments of KPMG (Peat Marwick Mitchell). Additionally she spent one year as a senior corporate tax consultant in the Tax Planning department of Teledyne, Inc., and ran her own tax and business management practice for several years.

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PANELISTS

LEAH BISHOP, Partner
Loeb & Loeb LLP

Leah Bishop focuses her practice on estate and gift tax planning for high net worth individuals and closely held businesses, and in the administration of estates and trusts. Ms. Bishop also has extensive experience in the areas of charitable giving and tax exempt organizations.

Ms. Bishop's estate planning experience includes substantially all aspects of legal matters pertaining to high net worth individuals, including probate court procedures, living trusts, gift and insurance trusts, and sophisticated transfer tax techniques. Her charitable giving and exempt organizations representation involves all aspects of tax and corporate nonprofit law. Ms. Bishop represents many leading private foundations and public charities.

Ms. Bishop has lectured on charitable giving and wealth management for the Western Conference on Tax Exempt Organizations, the CPA Foundation, YPO, The Blue Ribbon Finance Forum, Harvard-Westlake, Occidental College, UCLA, the Los Angeles County Museum of Art (LACMA), ArtTable, the Beverly Hills Bar Association Committee for the Arts, the Skirball Cultural Center, Hebrew Union College, the California Community Foundation, and the Jewish Community Foundation, among others.

Ms. Bishop earned her J.D. from Columbia University School of Law and her B.A. from Brandeis University, summa cum laude.

GWEN I. WALDEN
Principal of Walden Philanthropy Advisors

Gwen Walden is Principal of Walden Philanthropy Advisors (WPA) which she launched in 2007 after a 21-year career in philanthropy. Gwen's more than two decades of experience encompasses major programmatic, management, and executive leadership assignments at two of the largest foundations in the United States: The J. Paul Getty Trust and The California Endowment. Gwen's distinguished career is marked both by her encyclopedic knowledge of the history and practice of philanthropy, and by her hands-on experience managing major foundation initiatives and functions.

Gwen's consulting practice focuses on the high-level needs of Boards of Directors and senior and executive leadership of private foundations, family foundations, corporate giving entities and public agency grantmakers. She specializes in working with her clients on issues of strategic importance to their organizations. Gwen also specializes in assisting Boards and management staff in planning and implementing major staff and structural changes related to improving organizational effectiveness and increasing the impact of their philanthropy.

Gwen also maintains a specialty practice devoted to the planning, development, and building of foundation facilities. She developed this unique niche as the primary manager in charge of The California Endowment's Center for Healthy Communities building in Downtown Los Angeles.

Gwen has been an active member of the field of philanthropy for many years serving on numerous professional boards and committees. She is especially proud of her efforts to increase the diversity of the profession. Gwen earned a Bachelor's degree from The George Washington University and a Master's degree from The Johns Hopkins University.

DARYA ALLEN-ATTAR, Financial Advisor
Morgan Stanley Smith Barney LLC

Darya is a Financial Advisor at Morgan Stanley Smith Barney*, "MSSB", where she has spent almost 15 years of her career.

Darya focuses on Strategic Wealth Management for nonprofits, foundations, endowments and high net-worth families. In her work with nonprofit endowments, she focuses on the investment process and is knowledgeable about the fiduciary obligation of the nonprofit Board member, particularly as it relates to investments. In working with nonprofits, she draws on the significant resources of the Institutional Consulting Group and the Fiduciary Asset Management program at MSSB. Darya's typical client is a nonprofit or family foundation with $5 million in net liquid investable assets, with an investment portfolio which is globally diversified across a broad range of assets ranging from conservative short term liquid investments to illiquid alternative investments.

After earning her CPA at KPMG Peat Marwick – Nonprofit Practice Group, she joined Morgan Stanley in New York, now MSSB. Darya earned her BA from Kalamazoo College, Certificate in Accounting from Northwestern University and her MBA in Finance from Fordham University. Darya and her family moved to Los Angeles from the New York area in 2002. She is still involved with her CPA professional associations, has taught as an adjunct professor at New York University, and is a regular speaker at seminars focused on the nonprofit sector.

*Includes predecessor firms.

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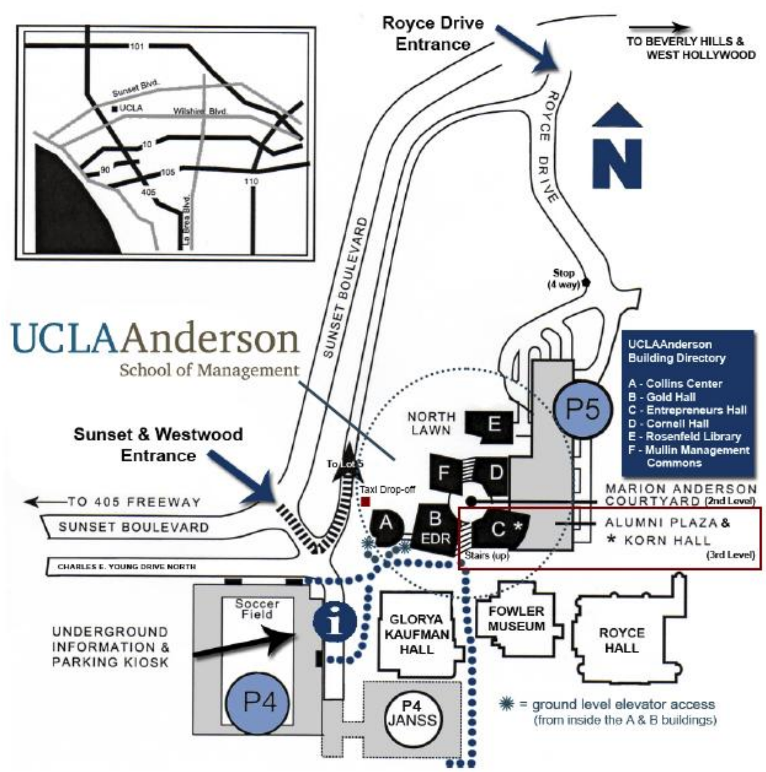
PARKING INFORMATION

From the 405/San Diego Freeway:

- If taking the 405 freeway South from the San Fernando Valley, exit Sunset Blvd, turn left onto Church Lane, and turn left again at Sunset Blvd.
- If taking the 405 freeway North from the Westside, exit Sunset Blvd, turn right onto Sunset Blvd from the freeway off ramp.
- Proceed East on Sunset about 1.5 miles to the Sunset & Westwood entrance of campus. Turn right onto Westwood Plaza and proceed forward and down into **Parking Structure 4** (P4 – which is underground).
- When you enter the parking structure, you will see a kiosk to your left-hand side. **Parking is $10**.
- Take one of several exit tower elevators in the parking garage to the Plaza level. Follow the small dotted paths, as indicated in the map above to UCLA Anderson, a series of red brick buildings labeled A – F above.
- Walk up the large staircase between buildings B & C to the Marion Anderson Courtyard. Turn right to Entrepreneurs Hall, building "C".
- Korn Hall is located on the 3rd Level of Entrepreneurs Hall.

Directions to UCLA Anderson School of Management



UCLA Anderson is located in the north central section of the UCLA Campus.

This map may be downloaded from the UCLA Anderson website here: http://www.anderson.ucla.edu/visit.xml

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