

AGENDA

Charitable Planning and Exempt Organizations Committee 2019 RPPTL Executive Council Meeting JW Marriott Marquis, Miami Friday, November 8, 2019

- I. Introduction (**Dial-In, Listserve**)
- II. Brief Review of Minutes from July 25th Meeting – Seth
- III. Educational
 - A. Charitable Organization Viewpoint (United Way of Miami-Dade)
 - B. Articles for ActionLine – Andrew Thompson
 - C. Recent Developments
 - D. Future Presentations
- IV. Inaugural Charitable Symposium - Seth
 - a. Date: October 16, 2020 (Friday)
 - b. Location: Miami
 - c. Hotel: United Way of Miami-Dade, Epic Hotel, University of Miami, JW Marriott Miami
 - d. Speakers (Paul Lee, Jerry Hesch, Kelly Hellmuth, Blaine Winship, Elaine Wilson, Norman Lipoff)
 - e. Topics of interest
 - f. CLE (including ethics and technology)
 - g. Sponsors (United Way of Miami-Dade, University of Miami, National Philanthropic Trust, YMCA of South Palm Beach, Wells Fargo)
 - h. Fees and Costs
 - Sponsorship levels - \$1,000; \$2,000; \$500
 - Attendance - \$200
- IV. Legislative - Jason
- V. Recruiting new members
- VI. Reports from Other Charitable Committees
 - a. ACTEC - Lou
 - b. ABA RPTE Charitable Group - JEH
 - c. NYSBA, New York City Bar - SRK