Dear Colleague,

Thank you for joining us at our inaugural Family Philanthropy Forum, *Donors & Their Families: Enduring Issues, Emerging Themes, Endless Possibilities*, in partnership with J.P. Morgan Philanthropy Centre. This forum is an opportunity for individual donors and their family members to come together with their peers to share their experiences and challenges, and inspire one another to even greater meaning and impact through their giving.

Over the course of the day, you will have the opportunity to hear from and interact with leading experts and donors who are at the forefront of family-centered philanthropy. We will begin with a conversation with Jeff and Tricia Raikes, who have dedicated their own giving to building the field of family philanthropy, and will conclude with a conversation of family members from two of America's most distinguished philanthropic families—the Andrus and Hilton families. A series of morning sessions will explore an array of issues about how to start on your philanthropic journey, structure your giving and involve your family. In the afternoon sessions, we will examine strategies for making a difference from impact investing to working together to innovating across generations.

We hope this gathering of donors and their families, individuals who are committed to being more intentional in their giving, will spark new ideas and shape opportunities for the endless possibilities of family philanthropy.

A special thanks to our breakout session sponsors – the California Community Foundation and the Jewish Community Foundation of Los Angeles – and for the inspiration and guidance from members of The Center on Philanthropy & Public Policy's Director's Circle.

James M. Ferris
DIRECTOR

Program

8:00AM–8:45AM Registration / Breakfast

8:45AM–9:00AM Welcome and Introduction

9:00AM–10:15AM

Our Passion, Our Journey, and What We Have Learned Thus Far

What can you do to increase the meaning and impact of your giving? Jeff and Tricia Raikes will discuss their commitment to building the field of philanthropy as well as share lessons they are learning on their philanthropic journey.

Jeff & Tricia Raikes, CO-FOUNDERS, RAIKES FOUNDATION
in conversation with
Bob Graziano, SENIOR MANAGING DIRECTOR, STRATEGY & DEVELOPMENT WEST REGION, J.P. MORGAN PRIVATE BANK

10:15AM–10:30AM Break

10:30AM–11:30AM

Developing Approaches for Meaningful Giving

Sponsored by Jewish Community Foundation of Los Angeles

These interactive sessions will illustrate the myriad ways in which philanthropic values are introduced and shared by the family.

Getting Started

John Kobara, EXECUTIVE VICE PRESIDENT & COO, CALIFORNIA COMMUNITY FOUNDATION
in conversation with
Nicholas Tedesco, EXECUTIVE DIRECTOR, SENIOR PHILANTHROPIC ADVISOR, J.P. MORGAN PHILANTHROPY CENTRE

Structure of Giving

Leah M. Bishop, CO-CHAIR, TRUSTS & ESTATES, LOEB & LOEB LLP
in conversation with
Marvin Schotland, PRESIDENT & CEO, JEWISH COMMUNITY FOUNDATION OF LOS ANGELES

Family Dynamics and Transitions (Part I)

Danielle Oristian York, MANAGING DIRECTOR, 21/64
in conversation with
Lisa Parker, PRESIDENT & EXECUTIVE DIRECTOR, LAWRENCE WELK FAMILY FOUNDATION

11:45AM–1:30PM

Successes from American Philanthropy

What are some of the successes from American philanthropy that may have lessons for the possibilities of family philanthropy?

Karl Zinsmeister, VICE PRESIDENT OF PUBLICATIONS, THE PHILANTHROPY ROUNDTABLE
introduced by
Wendy Wachtell, PRESIDENT, JOSEPH DROWN FOUNDATION

1:30PM–1:45PM Break

1:45PM–2:45PM

Strategies for Greater Impact

Sponsored by California Community Foundation

These interactive sessions will examine how family philanthropy is working to have greater impact to solve critical public problems.

Working Together to End Homelessness

Elise Buik, PRESIDENT & CEO, UNITED WAY OF GREATER LOS ANGELES
in conversation with
Leslie Lassiter, MANAGING DIRECTOR, PRIVATE BANKING, J.P. MORGAN PRIVATE BANK

Achieving Impact in Intergenerational Programs

Trent Stamp, CEO, THE EISNER FOUNDATION
in conversation with
Cara Esposito, EXECUTIVE DIRECTOR, LEONETTI / O'CONNELL FAMILY FOUNDATION

Impact Investing and Climate Change

Sam Bonsey, SENIOR DIRECTOR, THE IMPACT
in conversation with
Thomas C. Landry, INVESTMENT SPECIALIST, J.P. MORGAN ENDOWMENTS & FOUNDATIONS GROUP

Family Dynamics and Transitions (Part II)

Danielle Oristian York, MANAGING DIRECTOR, 21/64
in conversation with
Lisa Parker, PRESIDENT & EXECUTIVE DIRECTOR, LAWRENCE WELK FAMILY FOUNDATION

3:00PM–4:15PM

Giving Across Generations: Honoring the Legacy, Inventing the Future

How do successive generations build on the traditions of their family's philanthropy and at the same time forge innovative approaches for giving in today's landscape?

Kelly Davenport Nowlin, TRUSTEE, SURDNA FOUNDATION
Steve Hilton, CHAIRMAN OF THE BOARD, CONRAD N. HILTON FOUNDATION
in conversation with
Jim Ferris, DIRECTOR, THE CENTER ON PHILANTHROPY & PUBLIC POLICY

4:15PM–5:00PM Reception

Forum Speakers

Leah M. Bishop

CO-CHAIR, TRUSTS & ESTATES, LOEB & LOEB LLP

Leah Bishop is a partner at Loeb & Loeb LLP where she 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 and co-chairs the firm's national practice in this area. Ms. Bishop's estate planning experience includes 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.

Sam Bonsey

SENIOR DIRECTOR, THE IMPACT

Sam Bonsey is Senior Director of The ImPact, a global network of families committed to making more impact investments more effectively. Sam is also a board member of Keller Enterprises, a family office committed to values-aligned investing, sustainable agriculture, and venture philanthropy. Sam is a member of the 100% Impact Network, a peer network of individuals and families who have committed to investing all of their assets for positive social and environmental impact. In 2010, Sam cofounded the 2Seeds Network, an NGO incubating agricultural business in Tanzania. In 2015, Sam was recognized by Forbes as a "30 Under 30" Social Entrepreneur. He graduated magna cum laude from Harvard College and lives in New York.

Elise Buik

PRESIDENT & CEO, UNITED WAY OF GREATER LOS ANGELES

For nearly a decade, Elise Buik has been a community leader and spokesperson to advocate for our most vulnerable neighbors: the homeless, veterans and students. She has been instrumental in transforming United Way of Greater Los Angeles from its historical fundraising role into a community impact organization that identifies social issues, convenes experts, partners with other organizations and crafts innovative solutions and policy. Under her leadership, UWGLA launched a strategic 10-year action plan called Creating Pathways Out of Poverty to help tackle poverty in L.A. County through a comprehensive and collaborative approach tied to measurable results. Elise currently serves on the boards of the Pacific Council, the Los Angeles Area Chamber of Commerce, the USC Price Board of Councilors, Cal State LA, LA 2024, and is a member of the Civic Alliance.

Cara Esposito

EXECUTIVE DIRECTOR, LEONETTI / O'CONNELL FAMILY FOUNDATION

Cara Esposito is the Executive Director of the Leonetti/O'Connell Family Foundation, which funds innovative projects and initiatives that benefit Los Angeles County and improve the wellbeing of its communities. The foundation grants over $2.5 million annually. Prior to her role as Executive Director, Cara spent nine years as a Los Angeles County Deputy District Attorney, with special emphasis in Juvenile Prosecutions. Cara graduated with a BA from Harvard University, a JD from Loyola Law School, an MPA and a Doctorate in Policy Analysis and Planning from USC's Price School of Public Policy. Cara sits on the Board of Trustees of the Children's Institute, Inc., The Price School of Public Policy at USC, and Southern California Grantmakers.

Jim Ferris

DIRECTOR, THE CENTER ON PHILANTHROPY & PUBLIC POLICY

James M. Ferris is the founding Director of The Center on Philanthropy & Public Policy at the University of Southern California. He is a Professor in the Sol Price School of Public Policy and holds the Emery Evans Olson Chair in Nonprofit Entrepreneurship and Public Policy. He specializes in the economics of the public and nonprofit sectors, public finance and public policy and is a Fellow of the National Academy of Public Administration. Dr. Ferris' research focuses on the shifting roles of the public, nonprofit and for-profit sectors in governance and the economy. He is currently investigating the changing landscape of philanthropy; roles and strategies for foundation engagement in public policymaking; philanthropic-government partnerships; and place-based philanthropy.

Bob Graziano

SENIOR MANAGING DIRECTOR, STRATEGY & DEVELOPMENT WEST REGION, J.P. MORGAN PRIVATE BANK

Bob Graziano is responsible for corporate strategy and development for J.P. Morgan's Private Bank in the Western Region. Previous to his current role, Bob was the Southern California Market Manager for J.P. Morgan's Private Bank. Before joining J.P. Morgan, Bob was Managing Partner of the Family Advisory Services Group at Northern Trust. Prior to joining Northern, Bob spent 18 years with the Los Angeles Dodgers, serving his final six years there as the Club's President and Chief Operating Officer. Bob graduated summa cum laude in Business Administration from the University of Southern California. Bob is Chair of the Los Angeles Sports and Entertainment Commission and the immediate past Chair and current board member of the LA84 Foundation. He also serves as an advisory board member of the Jackie Robinson Foundation, the USC Leventhal School of Accounting, the USC Sports Business Institute and is a member of the 2016 U.S. Olympic Trials Marathon Host Committee.

Steve Hilton

CHAIRMAN OF THE BOARD, CONRAD N. HILTON FOUNDATION

Steven Hilton is Chairman of the Board for the Conrad N. Hilton Foundation, overseeing the worldwide humanitarian work of the foundation established by his grandfather in 1944. After graduating from the University of California, Santa Barbara and working in hotel management, he joined the Hilton Foundation in 1983. In 1989, Hilton received a Master of Business Administration from the University of California, Los Angeles Anderson School of Management and that same year he was named vice president of programs at the Foundation and was elected to its board of directors. Hilton was named president in 1998, in 2005 his responsibilities expanded to include CEO, and in 2012 he was named chairman.

John Kobara

EXECUTIVE VICE PRESIDENT & COO, CALIFORNIA COMMUNITY FOUNDATION

John E. Kobara is a respected figure nationally in the philanthropic and nonprofit communities. As chief operating officer of CCF, he is responsible for all of the development, marketing, administrative, grantmaking, civic engagement and donor relations functions of the foundation. He joined the foundation in 2008 to head the external and donor relations department. From 2003-2008, he was on the foundation's board of directors while serving as head of Big Brothers Big Sisters of Greater Los Angeles. For 35 years, Kobara has been leading and managing innovative nonprofit organizations, companies and technology startups, and actively involved in advancing social justice by increasing access to educational opportunities in Los Angeles. In 2007, Kobara received the City of Angels Award for his service on behalf of children and families. He was a Coro Fellow in Los Angeles and earned a bachelor's from UCLA, a master's in business administration from USC and a master's from Occidental College.

Thomas C. Landry

INVESTMENT SPECIALIST, J.P. MORGAN ENDOWMENTS & FOUNDATIONS GROUP

Thomas C. Landry is an Investment Specialist with the J.P. Morgan Endowments & Foundations Group. He is responsible for managing client portfolios and overseeing the business for the Western and Southern U.S. Prior to assuming his current role, Thomas was co-head of the Private Bank investment business in the Rocky Mountain Region, working with corporate executives, entrepreneurs and nonprofit organizations. Thomas joined the Fixed Income Portfolio Management Team in 2008 and helped develop and oversee over $9 billion in managed fixed income assets. Thomas began his career with the firm in 2004, joining BankOne in Denver. Thomas earned a degree in business administration from the University of Colorado, and holds Series 7 and 63 certifications.

Leslie Lassiter

MANAGING DIRECTOR, PRIVATE BANKING, J.P. MORGAN PRIVATE BANK

Leslie Lassiter is a Managing Director and leads the Entertainment Practice in J.P. Morgan's Private Bank in Los Angeles. A veteran banker, Leslie joined Chase Manhattan Bank in 1979. During her more than 30 years with the firm, she has held a number of senior leadership positions in both the Private Bank and the Investment Bank. Leslie joined the Private Banking business in 2000. Prior to moving to Los Angeles, Leslie managed a significant portion of the Private Bank's New York City business as the market manager for the New York metro area. Previously, Leslie led the strategic planning office for Chase Manhattan's wholesale business and prior to that, she managed corporate finance efforts for the Investment Bank's Latin American region. Leslie earned a bachelor's degree in quantitative economics from Scripps College and a M.B.A. from the University of Chicago. Leslie served on the Board of Scripps College for 15 years and chaired the Institutional Advancement Committee for 10 of those years. In 2013 she joined the board of the United Way of Greater Los Angeles and since 2014, Leslie has served on the Board of The Los Angeles Chamber Orchestra.

Kelly Davenport Nowlin

TRUSTEE, SURDNA FOUNDATION

Currently a family trustee of the Surdna Foundation, Kelly chairs both the Andrus Family Program and Centennial Working Group. Kelly is responsible for outreach to, and engagement of, nearly 500 living descendants of Surdna founding patriarch, John E. Andrus and identifies opportunities to collaborate with other family foundations and youth philanthropy programs. Kelly is guiding the development of activities marking Surdna's 100th anniversary in 2017. Kelly was a founding board member of the Andrus Family Fund (AFF), an independent grantmaker launched by Surdna in 2000 as a grantmaking fund for fifth generation family members. She helped develop program areas, governance policies and bylaws, mission, strategic vision, and committees of the board of this $4 million fund. Kelly served as Vice Chair, then Co-Chair for four years of her seven-year term.

Lisa Parker

PRESIDENT & EXECUTIVE DIRECTOR, LAWRENCE WELK FAMILY FOUNDATION

Lisa Parker brings 30 years of experience in philanthropy and nonprofit management to her work with philanthropic families. Since 1997 Lisa has been President and Executive Director of the Lawrence Welk Family Foundation, leading the foundation's poverty initiatives, seeding the youth giving movement and creating youth philanthropy programs for the family's 4th generation. In 2009 Lisa founded Family Circle Advisors where she and her team help families increase the impact of their giving and navigate the complex family relationships critical to the success of a family foundation or enterprise. Family Circle Advisors also facilitates family retreats and is a leader in providing experiential team building events for family foundations and family businesses. Lisa is certified by 21/64 (a division of The Andrea & Charles Bronfman Philanthropies) as a multi-generational advisor to families.

Jeff & Tricia Raikes

CO-FOUNDERS, RAIKES FOUNDATION

Jeff and Tricia Raikes are co-founders of the Raikes Foundation, which works toward a just and inclusive society where all young people have the support they need to reach their full potential. The foundation focuses on youth-serving systems, seeking to make them work better on behalf of the most marginalized young people in our society. The couple first met at Microsoft Corporation, where Tricia led the company's Creative Services Division and Jeff later served as president of the Microsoft Business Division. After a 27-year career at Microsoft, Jeff served as CEO of the Bill & Melinda Gates Foundation from 2008 to 2014. He is a trustee at Stanford University and sits on the boards of Costco Wholesale and, along with Tricia, the Jeffrey S. Raikes School of Computer Science and Management at the University of Nebraska-Lincoln. Tricia has been recognized as a White House Champion of Change for the foundation's work on youth homelessness. Jeff and Tricia have three children and live in Seattle.

Marvin Schotland

PRESIDENT & CEO, JEWISH COMMUNITY FOUNDATION OF LOS ANGELES

Marvin I. Schotland is president and chief executive officer of the Jewish Community Foundation of Los Angeles, the largest central clearinghouse for Jewish philanthropists in Southern California, with assets of over $1 billion. Mr. Schotland began his tenure at the foundation in May 1989 as executive vice president, after having served four years as the executive director of the Jewish Community Foundation of Metrowest, New Jersey. He was previously executive director of the Jewish Community Foundation of Southern Arizona for two years. A native of Youngstown, Ohio, Mr. Schotland earned his bachelor's degree and law degree from the University of Cincinnati. He was an assistant attorney general for the state of Ohio and was in private legal practice in Tucson, Arizona specializing in income and estate tax planning. He also has been co-adjunct professor at the University of Arizona and at Rutgers State University.

Trent Stamp

CEO, THE EISNER FOUNDATION

Trent Stamp has served as CEO of The Eisner Foundation since 2008. He is responsible for all aspects of the foundation's management, including strategy, execution, operations, evaluation, marketing, and the awarding of The Eisner Prize. Trent is a recognized national leader in the field of aging, serving on the boards of Grantmakers in Aging and The Milken Institute's Center for the Future of Aging. He also serves as a member of the Board of Advisors for The Center on Philanthropy & Public Policy at USC and The Board of Directors at Eisner Health. He has taught Nonprofit Management and Leadership at the Price School of Public Policy at USC, consults for the Committee on the Arts at The Aspen Institute, and recently completed a 6-year term on the Board of Directors of Southern California Grantmakers, where he chaired the audit committee.

Nicholas Tedesco

EXECUTIVE DIRECTOR, SENIOR PHILANTHROPIC ADVISOR, J.P. MORGAN PHILANTHROPY CENTRE

Nicholas Tedesco serves as a Senior Philanthropic Advisor in the J.P. Morgan Philanthropy Centre. Based in San Francisco, Nicholas provides clients in the Western Region with insights and services to help meet their philanthropic goals through innovative advice, thought leadership and collaborative opportunities. Prior to joining J.P. Morgan, Nicholas served as a Relationship Manager and Program Officer at the Bill & Melinda Gates Foundation, where he helped launch the Giving Pledge – an effort led by Bill and Melinda Gates and Warren Buffett to encourage the world's wealthiest individuals and families to commit the majority of their wealth to philanthropy. In this role, Nicholas managed relationships with current and prospective members of the pledge, as well as their staff and advisors. He helped to connect global philanthropists with one another in an effort to exchange knowledge and encourage collaboration.

Wendy Wachtell

PRESIDENT, JOSEPH DROWN FOUNDATION

Wendy Wachtell is president of the Joseph Drown Foundation, a Los Angeles based private foundation that distributes approximately $5 million annually to nonprofits in the Los Angeles area. Ms. Wachtell is responsible for all grant evaluation, site visits, recommendations to the Board of Directors and post-grant evaluation. In addition, Ms. Wachtell oversees the investment portfolio of just under $100 million in assets and has been at the Foundation for over twenty-six years. She serves on a variety of boards including: Joseph Drown Foundation, Harvard-Westlake, The Rape Foundation; USC Price School Board of Councilors, The USC Center on Philanthropy & Public Policy and others. Prior to joining the Foundation, Ms. Wachtell was a field producer and planning editor for KCBS-TV in Los Angeles and a Legislative Assistant and speechwriter for Congressman Julian C. Dixon in Washington, D.C.
She holds an MA in Journalism from USC and a BA from Wellesley College.

Danielle Oristian York

MANAGING DIRECTOR, 21/64

Danielle Oristian York is the Managing Director at 21/64. She consults with multi-generational families, the next generation and their advisors on multigenerational engagement, financial literacy, and empowering the next generation. Before 21/64, Danielle held positions at Pitcairn, a family office, and UBS. Serving multi-generational families, her multi-faceted roles included developing and delivering customized financial education, facilitation of family meetings and personalized coaching and mentorship. Danielle earned a Bachelor's degree in Communication from James Madison University and completed the postgraduate program at The Bowen Center for the Study of the Family at Georgetown. She is also a member of the Collaboration for Family Flourishing. She lives on the south shore of Boston with her young family.

Karl Zinsmeister

VICE PRESIDENT OF PUBLICATIONS, THE PHILANTHROPY ROUNDTABLE

Karl Zinsmeister oversees all magazine, book, and web publishing at The Philanthropy Roundtable in Washington, D.C. His most recent book offers a vision for constructive culture change, working around electoral gridlock. His 2016 creation, The Almanac of American Philanthropy, is the culmination of a multiyear effort to create the authoritative reference on America's fascinating and culturally seminal tradition of solving public problems with private resources. He also founded and advises the Roundtable's program on philanthropy for veterans and service members. Earlier in his career he was a Senate aide to Daniel Patrick Moynihan, the J. B. Fuqua Fellow at the American Enterprise Institute, and editor in chief for nearly 13 years of The American Enterprise magazine. From 2006 to 2009 Karl served in the West Wing as the President's chief domestic policy adviser and director of the White House Domestic Policy Council. He is a graduate of Yale University and also studied at Trinity College Dublin.

Notes