

Committee Report

Zoom - May 20, 2026

Executive Council Meeting & Annual Convention Ponte Vedra Inn and Club

Ponte Vedra, Florida – May 27 – 30, 2026

Date: 5/4/2026

Committee Name: Charitable Planning & Exempt Organizations

Chair(s): Alyssa Razook Wan

Vice Chair(s): Carla DeLoach and Jeff Spina-Jennings

Total committee members: 50 Avg. attendees/meeting: 35 Meetings held since last EC meeting: 3 (We hold meetings concurrent with EC meetings.)

1. Where was your last meeting held? January 29, 2026 at 9:00 at the Sunseeker Resort (Charlotte Harbor), hybrid meeting 2. Was your meeting attendance offered by Zoom/virtual? both If so, how many attended virtually? 9
3. Significant topics discussed at last meeting: Terminating a Private Foundation to a DAF; Changes in Charitable Giving under OBBBA; actively responded on proposed legislation - SB 1338 Charitable Giving by Burton
4. Is the committee working on proposing legislation or proposing any section positions? Yes. If so, please provide the status of the proposals: a) Charitable Organizations Privacy Protection Act – Joint Project with IRA, Insurance and Employee Benefits: Denise Cazobon is the liaison who is working on finalizing language for approval by both committees prior to circulating to other interested committees for comment. We will hold a vote on the proposed language at the upcoming meeting; and b) Stewardship Trust – co-chair Jeff Spina-Jennings has led a Stewardship Trust subcommittee and has sought coordination with the Trust Law Committee. He has prepared draft language that was reviewed by our Stewardship Trust subcommittee to be discussed at our upcoming meeting. The next step is to pass the draft statute to the Trust Law Committee for further consideration, which will be discussed at the upcoming meeting.
5. Is your committee working on any special projects, yes/no? - No a) If so, has your committee received funding for the project? b) If so, how were those funds spent?
6. Date(s) and format of your next committee/sponsored CLE(s): None scheduled. Our committee offered two CLEs this year. 7. Topics and speakers for upcoming committee-sponsored CLE(s): 8. Topics and speakers for upcoming committee sponsored publications in Action Line/Florida Bar Journal: a. From Private Equity to Public Good, Pre-closing Considerations When Using DAFs as Tools for Business Owners, Carla DeLoach (in progress)

b. Know Before You Go: Ethical Considerations in Representing Charities, Jonathan Baker and Tara Rao Bild (submitted)

c. Amending the Purpose of Endowed Funds Under FUPMIFA, Nicolette Rea and Jeff Spina-Jennings (in progress)

9. When is your next meeting scheduled?
May 20, 2026

10. What substantive topics will be voted on at that meeting, if any?
Charitable Organizations Privacy Protection Act and Stewardship Trust – see 4a above

Time Requested for oral report at:

Roundtable: No oral report ☒; 3 minutes ☐; 6 minutes ☐; 9 minutes ☐

Executive Council: No oral report ☒; 3 minutes ☐; 6 minutes ☐; 9 minutes ☐

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