

## Program Related Investments: How Private Foundations Can Earn a Return While Making Qualifying Distributions



**Friday, May 21, 2021**

via Zoom

**10:00 am to 11:15 am**

10:00 am Presentation

11:00 am Q&A

**Presented by Casey Hale**

Like a grant, a PRI is a vehicle for making charitable capital available to organizations committed to addressing social or environmental concerns. Unlike a grant, however, a PRI is repaid with at least a modest rate of return. After a PRI is repaid, the private foundation may reuse the PRI to fund other charitable purposes. Therefore, a PRI can be a more effective use of foundation assets than a grant. You will learn:

- What is a PRI
- When a private foundation should consider making a PRI
- How making a PRI affects minimum distribution requirements
- How making PRIs can grow a private foundation's portfolio
- Typical barriers to PRI use and ways to overcome them

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