

Lawyer on Call

A Philanthropy Ohio Member Service

Do you have a legal question about some aspect of your foundation's operations? Need an answer right away? Philanthropy Ohio can help get you the answer you need, with the first hour of consulting services complimentary as part of your Philanthropy Ohio membership. (Note: must be current, paid member to access free hour of advice.) We have years of experience in connecting our members to expert legal advice and are pleased to introduce Philip Purcell as our new Lawyer on Call.

HOW PHIL CAN HELP

HERE'S A SAMPLE OF THE KIND OF QUESTIONS PHIL CAN ANSWER:

- What are the rules about giving scholarships from donor advised funds?
- Can I amend a fund agreement to change its purpose – and if so, how?
- What is expenditure responsibility and how do I implement it?
- What are excess benefits?
- Can I make grants to individuals? School levy campaigns?
- How does UPMIFA apply to my foundation?
- Can I reimburse a trustee for travel expenses for his/her children who accompany him/her to a board meeting?

"Phil Purcell is well versed in the laws governing tax exempt organizations and we have relied on his advice to guide us through changes to fund agreements and complex gifts. He is timely as well as thorough in responding to our questions. We consider Phil a valuable part of our community foundation team."



Brady Groves
President, Richland
County Foundation

HOW TO ACCESS ADVICE

Contact Steve Phallen at 614.224.1344 or sphallen@philanthropyohio.org to submit your legal question. Steve will contact the attorney with your question and Phil will respond directly to you quickly – usually within 24 hours. The first hour of consulting services is complimentary as part of your Philanthropy Ohio membership. If more than the one free hour is needed to answer your question, you will work directly with Phil to discuss moving forward and absorb the cost, which is billed at \$185 per hour with an estimate Phil provides in advance of any further work completed.

KEY PERSONNEL

Phil Purcell, J.D., currently serves as Vice President for Planned Giving and Endowment Stewardship at the Ball State University Foundation. He also has consulted for the Indiana Philanthropy Alliance for more than 20 years, providing Lawyer on Call services to community foundations. Phil is Senior of Counsel to Fleming Stage, a law firm in Indianapolis, and is the lead planning attorney for the Heaton Smith Group, a national charitable and estate planning consulting firm. He teaches courses on law and philanthropy, nonprofit organization law and planned giving as adjunct faculty for the Indiana University Maurer School of Law and Indiana University Lilly School of Philanthropy



and Fundraising School. Phil received his bachelor's degree from Wabash College in 1981 (magna cum laude) and his Juris Doctor and master's degree in public administration (with honors) from Indiana University in 1985.