LEAVE A LEGACY®
Southeast Michigan
Development Day

2010 is shaping up to be another challenging year for nonprofit development.
In this environment, all development professionals are looking for an edge.
You need access to: • ***PERSPECTIVE*** • ***INFORMATION*** • ***BEST PRACTICES***

Invest just one day and get a year's worth of the insight and advice you need to be successful. You'll hear from top national and regional experts about the latest tips and trends for yourself, your organization and your donors. Network with others who can help you achieve your goals.

Don't get lost in the fog— break through and join us on

Thursday, June 3, 2010, The Fairlane Club, Dearborn

7:30 – 8:00am – Registration
Enjoy Pastries & Coffee While You Visit with Exhibitors and Network with Colleagues

Opening Plenary Session

8:00 – **Opening & Welcome**

Denise A. Fleckenstein, President, Planned Giving Roundtable of Southeast Michigan
Gary Dembs, President, Association of Fundraising Professionals, Greater Detroit
Jo Ellen Rahaim, Co-Chair, LEAVE A LEGACY, Southeast Michigan

8:15 – 9:05 am **Black, White or Gray: Ethical Shades in Charitable Gift Planning**

Tanya Howe Johnson, President & CEO, Partnership for Philanthropic Planning, Indianapolis, IN
We often think that finding black or white in a gray world is easy—until we hear a good argument that our 'Yes' is someone else's emphatic 'No'. Tanya will facilitate a lively and interactive discussion of gift planning case studies that challenge our ethical decision-making skills and gray-scale interpretations. The scenarios presented are based upon actual gift planning cases and involve both nonprofit gift planners and donor advisors.

Practical Track

9:15 – 10:05 am **Getting Board Support: A Case Study**

Robert E. Kass, Attorney, Barris, Sott, Denn & Driker, PLLC, Detroit, MI
Through a case study, learn how to make a compelling case to your board or senior management for implementing a PG program or increasing resources for an existing program, dispel common myths, and lay out next steps.

10:15 – 11:05 am **A Gift Agreement for Perpetuity**

Donna J. Snyder, Assistant General Counsel, University of Michigan, Ann Arbor, MI
Don't let the legal aspects of a gift agreement bog you down. This session will walk you through the process. What are the template possibilities? What's negotiable? What assistance can be provided? What are common concerns and questions of donors and gift officers?

11:15 – 12:05 pm **Who Are Your Donors and What Makes Them Tick?**

Philip M. Purcell, Vice President of Planned Giving, Ball State University Foundation, Muncie, IN
Learn about the unique aspects of donor demographics and the special psychology of deferred gift donors – from one of the leading experts on planned giving. Learn how to become a more effective fundraiser through a better understanding of your current and prospective benefactors.

Advanced Track

9:15 – 10:05 am **Planned Giving for Business Owners**

Philip M. Purcell, Vice President of Planned Giving, Ball State University Foundation, Muncie, IN

Data shows that business owners can be common and generous sources of planned gifts. This session will explore unique issues and opportunities for gift planning with business owners. Specific topics will include planning during the sale of a business, gifts of specific assets (e.g., S Corporation stock, inventory, equipment) and use of particular techniques (e.g., charitable remainder trusts, donor advised funds).

10:15 – 11:05 am **The Use of Charitable Lead Trusts in Volatile Markets: Benefits & Pitfalls for Donors and Charities**

Henry M. Grix, Attorney, Dickinson Wright, PLLC, Bloomfield Hills, MI

You will learn the fundamentals of Charitable Lead Trusts, including the various types of CLTs and how they work. Examples will be given showing how and why such trusts work well—and how and why they fail.

11:15 – 12:05 pm **Elder Law & Charitable Planning**

Matthew M. Wallace, JD, CPA, Law Firm of Matthew M. Wallace, PC, Port Huron, MI

How can charitable gifts be made without endangering nursing home Medicaid eligibility? State and Federal governments and agencies have a myriad of rules designed to prevent individuals from qualifying for Medicaid after giving their assets away prior to entering a nursing facility. Attorney-CPA Matthew M. Wallace will show you how to assist your donors to accomplish their objectives of providing for family members, charities, and their own care. These and other elder law issues will be discussed.

Afternoon Plenary Session

12:10 pm Lunch Buffet

12:45 – 1:30 pm **Is There Hope for Planned Giving?**

Tanya Howe Johnson, President & CEO, Partnership for Philanthropic Planning, Indianapolis, IN

The planned giving world as both nonprofits and financial advisors have traditionally known it has changed dramatically in the past 20 years. And, it often seems that these changes forecast doom and gloom—government scrutiny and regulation, elimination of charitable tax incentives, reduction in asset values, tension between financial advisors and charitable gift planners, a focus on outright gifts, a struggling economy, the list goes on and on. What are these changes? How are they affecting charities, fundraisers, advisors, and clients? What can we expect in the future? And, how can we work together to not only survive these challenges, but turn them into *charitable giving made most meaningful*?

1:40 – 2:30 pm **Gifts, Money & Taxes**

Shari M. Fox, Assist. Vice President for Development, University of Michigan, Ann Arbor, MI
Sally A. Baker, Director of Gift Planning, University of Michigan, Ann Arbor, MI

This energized session will provide information on basic fundamental tax rules and regulations as they relate to charitable giving. It is ideal for the fundraiser new to major and/or planned giving who seeks more information about the tax motivations and laws that donors should consider before making major and planned gifts. This is a highly interactive session presented in a game show format and received rave reviews at the PPP National Conference.

2:40 – 3:30 pm **Guerilla Marketing For Your Planned Giving Program**

Viken Mikaelian, Founder and CEO, PlannedGiving.Com, Phoenixville, PA

Learn tactics that successful **for**-profits use to increase revenue, and how to strategically utilize similar techniques to raise more gifts. Viken will also teach you how to avoid common mistakes that alienate prospects and squander limited budgets.

3:30 pm Enjoy Dessert Bar – Visit With Exhibitors – Network with Colleagues – Raffle Drawing

4 pm Conference Ends

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Practical Track ❑ Advanced Track ❑ (check one)

Note: 2010 nonprofit campaign parters can register up to 3 people at the discounted rate.
Additional Registrations:

Name: ___________________________________ Practical Track ❑ Advanced Track ❑

Name: ___________________________________ Practical Track ❑ Advanced Track ❑

Name: ___________________________________ Practical Track ❑ Advanced Track ❑

Name: ___________________________________ Practical Track ❑ Advanced Track ❑

Early Registration: (before May 21st)
Fees: LEAVE A LEGACY® 2010 Partner: $25 ❑ • PGRT Member: $75 ❑ • Guest: $85 ❑

Registration: (after May 21st)
Fees: LEAVE A LEGACY® 2010 Partner: $50 ❑ • PGRT Member: $100 ❑ • Guest: $110 ❑

Number Attending: _____ 2010 Partners $25 • _____ PGRT Member $75 • _____ Guest $85

Amount Enclosed: ______________________

❑ Check (payable to LEAVE A LEGACY, Southeast Michigan) ❑ Visa ❑ MasterCard

Credit Card # _________________________ Exp. Date ____/____

Billing Zip Code: _________

Cardholder's Signature: ___________________________________

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Mail RSVP and Check To : LEAVE A LEGACY®, 134 Third Street, Metamora, MI 48455
Fax RSVP and Credit Card Information to: (810)678-8544

Questions?: Contact Lori Angel at (810) 678-8514 or leavelegacy@airadv.net
www.leavealegacysoutheastmichigan.org.