



**LEAVE A LEGACY, Southeast Michigan
and The Association of Fundraising Professionals, Greater Detroit Chapter**

present

A Charitable Development Day

Thursday, May 15, 2008

The Fairlane Club, Dearborn

Morning Sessions

	<u>PRACTICAL TRACK</u>	<u>ADVANCED TRACK</u>
9- 9:50 am	How To Start A Planned Giving Program From Scratch Pamela J. Davidson, JD, President, Davidson Gift Design	Preparing for Perpetuity: How to Align Investments, Distributions and Goals Within A Private Foundation Brian Wodar, Bernstein Global Wealth Management
10- 10:50 am	Bequests & Gift Annuities: The Foundation of a Planned Giving Program Shari M. Fox, Director of Gift Planning, University of Michigan	Dimensioning the Power of A CRT Heather Tanguay, Bernstein Global Wealth Management
11-11:50 am	Putting It All Together Pamela J. Davidson, JD, President, Davidson Gift Design Shari M. Fox, Director of Gift Planning, University of Michigan Gregory A Schupra, VP & Group Manager, Comerica Charitable Services Group	Developing Sound Investment & Asset Allocation Policies for Foundations and Charities Richard Meyers, Bernstein Global Wealth Management

Afternoon Plenary Session

12pm	Lunch Buffet
12:15 pm	Achieving Financial Stability: Is It Possible For A Nonprofit Organization? Greg Schupra, Vice President & Group Manager, Comerica Charitable Services Group
12:50 pm	Legislative Overview Robin Ferriby, VP Philanthropic Services, Community Foundation for Southeast Michigan
1:10—2:20pm	How to Assist a Donor in Determining One's Gifting Capacity During One's Lifetime Brian Wodar, Bernstein Global Wealth Management
2:30 — 4:00pm	How Boom Generation Women Will Re-Write the Rules of Philanthropy Margaret May Damen, CFP, CLU, ChFC, President, The Institute for Women and Wealth

LEAVE A LEGACY is a program of the Planned Giving Roundtable of Southeast Michigan, a 501(c)(3) Michigan corporation.

**SPONSORED BY:
BERNSTEIN GLOBAL WEALTH MANAGEMENT
COMERICA CHARITABLE SERVICES GROUP**

Registration Deadline: Friday, May 9th, 2008

Mail RSVP and Payment To : LEAVE A LEGACY®, 134 Third Street, Metamora, MI 48455
Call or email questions to Lori Angel at (810)678-8514 or leavelegacy@airadv.net

Name : _____ Practical Track [] Advanced Track []

Organization: _____

Telephone: () _____ - _____ Email: _____

Fees: LEAVE A LEGACY® 2008 Partner: \$25 [] • PGRT/AFP Member: \$75 [] • Guests : \$85 []

Please complete one form for each registrant. For additional information about presenters and topics, please go to our website at www.leavealegacysoutheastmichigan.org.