



Planned Giving Roundtable  
of Southeast Michigan

## ***‘RECESSION – PROOF PHILANTHROPY: WHAT’S AHEAD IN GIFT PLANNING FOR 2010?’***

A VIRTUAL SEMINAR BROADCAST BY THE PARTNERSHIP FOR PHILANTHROPIC PLANNING

**PRESENTER:**

**NEAL P. MYERBERG, ATTORNEY/PRINCIPAL, MYERBERG SHAIN & ASSOCIATES (M/S/A)  
OLD GREENWICH, CT AND HONOLULU, HI**

THE ECONOMIC RECESSION HAS HAD A PROFOUND EFFECT ON PHILANTHROPIC GIFT PLANNING. NEW GIFT PLANNING STRATEGIES HAVE ARISEN TO FULFILL THE NEEDS OF DONORS AND CHARITABLE ORGANIZATIONS IN A DIFFICULT ECONOMIC ENVIRONMENT. THIS SESSION WILL REVIEW VARIOUS GIFT PLANS THAT HAVE BEEN IMPLEMENTED BY INDIVIDUALS AND ORGANIZATION IN 2009, USING CASE EXAMPLES FOR ILLUSTRATION, AND WILL ANTICIPATE THE PLANS THAT MAY BE IMPLEMENTED IN THE EARLY PART OF 2010, PARTICULARLY IN LIGHT OF TAX LAW PROVISIONS AND SOME PREDICTED ECONOMIC RECOVERY.

**Wednesday, January 20, 2010**

Registration: 12:30 p.m.  
Virtual Seminar: 1 - 2:30 p.m.

**Beaumont Hospital**  
3711 West Thirteen Mile Road  
Administration Bldg, Lower Level-Classroom 2  
Royal Oak, MI

Light refreshments will be provided.

Fee Sponsor  
**Fifth Third Bank**

Location Sponsor  
**Beaumont Foundation**

RSVP to *Lori B. Angel* at (810) 678-8514 or, [pgrtsem@airadv.net](mailto:pgrtsem@airadv.net).  
48-hour notice is requested for all reservations and/or cancellations.

***This meeting is free to all members and first-time guests.  
All other guests are \$25-payable in advance. MasterCard and Visa accepted.***

***Guest Cancellation policy: Cancellations made within 72-hours of the event are non-refundable.  
Prior to 72 hours, you may send someone in your place at no charge or  
you may request a refund minus a \$5 administration fee.***