



Planned Giving Roundtable
of Southeast Michigan

'HOW TO IMPLEMENT A FLEXIBLE PRUDENT INVESTMENT POLICY'

**PRESENTER: GREGORY A. SCHUPRA, VICE PRESIDENT & GROUP MANAGER
COMERICA CHARITABLE SERVICES GROUP, ANN ARBOR, MI**

THIS PROGRAM WILL REVIEW THE LAWS AND REGULATIONS GOVERNING ENDOWMENT FUNDS AND WILL HIGHLIGHT WAYS THAT NONPROFIT ORGANIZATIONS CAN CREATE FLEXIBLE ENDOWMENT POLICIES. THE PRESENTATION WILL PROVIDE INFORMATION THAT WILL ASSIST ORGANIZATIONS IN MAINTAINING THE INTEGRITY OF ENDOWMENT FUNDS WHILE PROVIDING FLEXIBILITY TO THE ORGANIZATION IN FULFILLING DONOR INTENT THROUGHOUT THE YEARS. PRUDENT INVESTOR COMPLIANCE REQUIREMENTS, UNIFORM MANAGEMENT OF INSTITUTIONAL FUNDS ACT, UNIFORM PRUDENT MANAGEMENT OF INSTITUTIONAL FUNDS ACT, ENDOWMENT FUND POLICIES, INVESTMENT POLICY STATEMENT AND DONOR CONTRIBUTION AGREEMENTS WILL BE REVIEWED FROM A PRACTICAL APPLICATION PERSPECTIVE.

Plus:

- A 5-minute update on tax and legislative matters for charitable gift planners
Presented by: Robin Ferriby, Vice President Philanthropic Services
Community Foundation for Southeast Michigan

**** ANNUAL MEETING ****

Thursday, June 17, 2010

Registration & Breakfast: 7:30 AM
Program: 8:00 – 9:30 AM

The Skyline Club
2000 Town Center, Suite 2800, Southfield

RSVP to *Lori B. Angel* at (810) 678-8514 or, pgrtsem@airadv.net.
72-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 at the door.