



Planned Giving Roundtable  
of Southeast Michigan

## ***'CHARITABLE GIFT ANNUITY REINSURANCE: WHAT IT IS, WHAT IT ISN'T, WHEN IT WORKS, AND WHEN IT DOESN'T***

A VIRTUAL SEMINAR BROADCAST BY THE PARTNERSHIP FOR PHILANTHROPIC PLANNING

**PRESENTER:**

**BRYAN CLONTZ, CFP, CLU, ChFC, AEP, CAP**

**PRESIDENT AND CO-FOUNDER, CHARITABLE SOLUTIONS, LLC, JACKSONVILLE, FL**

GIFT ANNUITY REINSURANCE HAS LONG BEEN A MISUNDERSTOOD TOPIC. LIFE INSURANCE COMPANIES SUGGEST REINSURING EVERYTHING. INVESTMENT MANAGERS SUGGEST REINSURING NOTHING. LIKE MOST THINGS IN LIFE, THERE IS A PRUDENT MIDDLE-GROUND. CHARITIES HAVE NEVER BEEN SO CONCERNED ABOUT GIFT ANNUITY POOLS AND ARE EXPLORING EVERY POSSIBLE OPTION FOR RISK MANAGEMENT. THIS SESSION WILL HELP ATTENDEES BETTER UNDERSTAND WHAT REINSURANCE CAN AND CAN'T DO TO MITIGATE RISK. CASE STUDIES WILL BE USED TO ANSWER MOST OF THE FREQUENTLY ASKED REINSURANCE QUESTIONS.

### **Wednesday, May 12, 2010**

**Registration: 12:30 PM**

**Virtual Seminar: 1 - 2:30 PM**

**Michigan Opera Theatre**

1526 Broadway, Detroit



Approved 1.5  
CFP & CFRE  
Credits

A guided tour of the Detroit Opera House is being offered immediately following the program.

Light refreshments will be provided.

Fee Sponsor  
**Community Foundation for Southeast Michigan**

Location Sponsor  
**Michigan Opera Theatre**

RSVP to *Lori B. Angel* at (810) 678-8514 or, [pgrtsem@airadv.net](mailto: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 in advance. MasterCard and Visa accepted.***