



Planned Giving Roundtable  
of Southeast Michigan

# Gift Agreements for Perpetuity

(Luncheon | Zoom Option Available)

**Presenter:** Samuel E. Nuxoll, Associate General Counsel, University of Michigan

Preserving a donor's wishes in writing can be important for the administration of current and planned gifts, especially for the long term. Sam will discuss when and why it is appropriate to have agreements with donors for their current and planned gifts. He will talk about the elements of agreements and what should and should not be negotiable.

**PLUS:** A Tax & Legislative Update by Laura Brownfield,  
General Counsel, Community Foundation for Southeast Michigan.

**Thursday, September 28, 2023**

**APPROVED FOR 1.0  
CFRE CE CREDITS**

**NETWORKING LUNCH: 12:00 PM**

**WELCOME & LEGIS UPDATE: 12:30 PM**

**PROGRAM: 1:00 – 2:00 PM**

**MENTOR GROUP: 2:00 – 3:00 PM**

**LOCATION : WALSH COLLEGE, 3838 LIVERNOIS, TROY**

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RSVP online: [www.plannedgivingroundtable.org](http://www.plannedgivingroundtable.org)

Questions: (810) 375-2180 or [pgrtsem@gmail.com](mailto:pgrtsem@gmail.com)

This meeting is free to members.

Guests are \$50 – payable in advance; V, MC, D and AE are accepted.