



Planned Giving Roundtable  
of Southeast Michigan

# Case Study Workshop

(Luncheon)

**Presenter: Rob MacGregor, WSU-School of Law**

This is an interactive session in which Rob will present several donor situations, setting forth an overview of a typical donor's assets and charitable goals, and will lead an open roundtable discussion as to possible charitable giving ideas and opportunities that could be of interest to the donor. Potential charitable approaches will include both lifetime giving opportunities as well as charitable plans taking effect at death. This program is very valuable for all fundraisers and advisors and is especially helpful to newer advisors and gift officers to assist them in reviewing and analyzing gift opportunities that do not always have a single "correct" solution. Please bring a willingness to participate – there are no wrong answers.

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

**Thursday, November 14, 2024**

**Networking & Luncheon: 12:00 PM**

**Program: 1:00 – 2:00 PM**

**Location: Lawrence Technological University**



Pending Approval  
1.0 CFRE CE Credits

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**Be curious. Make magic.**

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.