



## September Lunch Meeting Announcement

**DATE:** Tuesday, September 21, 2010 (RSVP before NOON on Thursday 9/16)

**SPEAKER:** Stephen S. Case, JD

**TOPIC: THE LAW AND ETHICS OF ENDOWMENTS**

Endowment can be described as a permanent fund that pays income to a charity, but that is the icebergs' tip. This program will examine the accounting and legal rules that govern the management of endowments and the ethical rules that guide professionals, especially attorneys, in their roles in building, managing and advising endowments.

Stephen S. Case currently consults with lawyers in areas of his expertise and serves as expert witness when appropriate. In addition, Steve is a trained Mediator, primarily mediating estate and trust disputes. He also serves as Bequest and Endowment Counsel to St Vincent de Paul, Phoenix Diocese, and as a consultant to other nonprofits in the areas of planned giving and bequest management.

**TIME:** Registration 11:15AM  
PGRT Business, lunch and program 11:30AM-1:15PM

**LOCATION:** [Phoenix Country Club - 2901 North Seventh Street](#)

**COST:** \$35 for members who have not purchased pre-paid meals  
\$45 for guests  
payment required at the door (only check or cash please)

**PLEASE NOTE:** [at-the-door & untimely RSVP's will be charged an additional \\$5.00](#)  
at-the-door attendee's please wait until the program starts before being seated  
no-shows are required to pay the applicable meeting fee



**Our THANKS to The Private Bank, Bank of Arizona  
for sponsoring the 2010 lunch meetings!!**

Yes, I will attend: \_\_\_PGRT Member \_\_\_Guest \_\_\_Remove me from your mailing list.

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EMAIL \_\_\_\_\_ Phone \_\_\_\_\_

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