

**Dawn Fenstad**

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**From:** Nancy Jones [njonesPGCCT@grandecom.net]  
**Sent:** Monday, January 23, 2012 12:53 PM  
**To:** 'Bob Vallilee'  
**Subject:** PGCCT Luncheon Meeting - 2/13/12 and Dates for 2012 Meetings for your calendar  
**Attachments:** 2-13-12 RSVP Form.doc



**2012 Dates: February 13, April 16, August 20, September 17, November 12, December 17**

**TO:** Guests and Members of Planned Giving Council of Central Texas  
**FROM:** Board of Directors of PGCCT (Rey Garza, Justin Gould, Cass Grange, Mike Jansen, April Hampton)  
**SUBJECT:** **Planned Giving Council of Central Texas  
Membership Meeting, Monday, February 13, 2012**  
**LOCATION:** **Truluck's Seafood, Steak, and Crab House, Naples Room**  
400 Colorado (Corner of 4<sup>th</sup> and Colorado), Austin  
**AGENDA:** 11:30 – Noon Registration of Guests and Members  
Noon – 1:00 **Lunch and Speaker: Jeff Gerold**  
**TOPIC:** **Gifts of Closely Held Assets**

For many people charitable contributions of non-publicly traded assets – private C- and S-Corp stock, restricted stock  
Jeff Gerold is Vice President and Charitable Planning Consultant for Fidelity Charitable, a 501c(3) charity.

**PARKING:** There is a public parking lot across the street from Truluck's and there are a number of metered parking spots in the  
**RSVP to Nancy Jones (njonesPGCCT@grandecom.net).** Please let us know as soon as possible (by email) if you plan on attending.

Bob Vallilee, President  
Planned Giving Council of Central Texas

Diocese of Austin  
512-949-2440

(to be sent as email)

**2012 dates: 2/13, 4/16, 8/20, 9/17, 11/12, 12/17**

**RSVP Form (mail or email)**

**Planned Giving Council of Central Texas  
Membership Luncheon, February 13, 2012**

**PLEASE REPLY BY February 8, 2012**

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Are you a current member: \_\_\_\_\_

Will you be bringing a guest? \_\_\_\_\_

Guest name: \_\_\_\_\_

Guest organization: \_\_\_\_\_

Guest address: \_\_\_\_\_

Guest payment \$35 at all times \_\_\_\_\_

Member:

Pay in advance @ \$30 \_\_\_\_\_

Pay at the door @ \$35 \_\_\_\_\_

**Member ONLY -- one-time discounted offer -- valid only until 2/13/12**

**Pay \$150 for all six meetings \_\_\_\_\_**

Total Enclosed: \_\_\_\_\_

Checks payable to: Planned Giving Council of Central Texas

Mail to: Nancy Jones  
P.O. Box 270156  
Austin, TX 78727