

REGISTRATION FEES

For Current Mid-Iowa Planned Giving Council members and Leave A Legacy® Iowa members

Received on or before October 14.....	\$100.00
Received on or after October 15.....	\$125.00

For Non-Council Members

Received on or before October 14.....	\$150.00
Received on or after October 15.....	\$175.00
Additional non-council members from same organization	\$125.00

To register, complete the registration form and mail payment to: MIPGC

Jacque Shoeman, Administrator | 6090 Colt Drive | West Des Moines, Iowa 50266

For more information, contact Joan Bindel by e-mail at jbindel@dmdiocese.org or by phone at 515-237-5079. Please make checks payable to Mid-Iowa Planned Giving Council.

Cancellation Policy

Cancellations made prior to October 18, will incur a \$50 cancellation fee. On or after October 18, no refunds will be given.

Continuing Education Credits

Application has been made for CFRE and CLE credit hours. A sign up sheet will be made available at the conference.

Hotel Accommodations

The Conference will be held at Hilton Garden Inn - Des Moines / Urbandale
I-80 / I-35 on 86th Street in Johnston, Iowa 50131
Phone: 515-270-8890

Registrants in need of overnight accommodations are responsible for their own hotel reservations. A block of rooms have been reserved until October 4, 2011 with a rate of \$109/ single room. Reservations can be made by calling 515-270-8890.

For a complete list of Des Moines area hotels, visit the Des Moines Convention and Visitors Bureau website at: www.seedesmoines.com.

Mid-Iowa Planned Giving Council (MIPGC)

MIPGC is a professional association providing educational opportunities, training and other resources designed to advance the field of gift planning and estate planning. Membership in MIPGC is open to anyone interested in practicing, facilitating or advancing charitable gift planning and estate planning in Iowa. Current members include gift planners, attorneys, trust officers, financial planners, chartered life underwriters and resource development officers from area nonprofit organizations.

MIPGC is affiliated with The Partnership for Philanthropic Planning.

To join MIPGC please download a membership application at www.mipgc.org/membership. Annual fees are based on a fiscal year and are \$100.



19TH ANNUAL FALL CONFERENCE



TRANSFORMING PHILANTHROPY BUILDING A CULTURE OF GIFT PLANNING

Tuesday, October 25, 2011
Hilton Garden Inn
Des Moines / Urbandale
I-80 / I-35 on 86th Street
Johnston, Iowa 50131



CONFERENCE SPEAKERS



Bryan Clontz, CFP®, CLU, ChFC, AEP, CAP, serves as the president and co-founder of Charitable Solutions, LLC. Over the last 15 years, he has served as the director of planned giving for the United Way of Metropolitan Atlanta, director of planned giving at the national office of Boys & Girls Clubs of America and as vice president of advancement at The Community Foundation for Greater Atlanta. Bryan has extensive experience in planned giving consulting, charitable gift annuities, non-cash asset receipt/disposition and donor advised funds. He has given more than 400 presentations on financial planning and planned giving topics and has been published in an international insurance textbook. In addition to writing more than a dozen articles for financial services and planned-giving journals, he authored a planned giving manual entitled *Just Add Water*, which has sold more than 2,000 copies. Bryan serves on the Partnership for Philanthropic Planning Board (2007-2010), editorial board of the Planned Giving Design Center, the Rate Recommendation and the Research Committee of the American Council on Gift Annuities, and on the Advisory Board of the American College Chartered Advisor in Philanthropy (CAP) designation program.



Johni Hays, J.D., is the senior gift planning consultant for The Stelter Company. With more than 15 years of experience as a practicing attorney specializing in charitable and estate planning, she is a recognized expert on the subject of gift planning. Johni is the author of *Essentials of Annuities* and co-author of *The Tools and Techniques of Charitable Planning*. She serves as a charitable planning author of Steve Leimberg's electronic newsletter service, LISI. She has been quoted in *The Wall Street Journal* and has published charitable planning articles in *Estate Planning*, *Fundraising Success*, *Life Insurance Selling* and *National Underwriter* magazines. Johni's expert and versatile talents take her on the road 90 days out of the year. She is in demand as a lecturer on estate and charitable planning, annuities, life insurance, retirement planning, and IRAs.



Bev Hutney is Director of Innovation and Research for The Stelter Company. With more than 20 years of communications and marketing experience, Bev oversees Stelter's editorial, graphic design and Web implementation teams. She is heavily involved in strategy and idea generation, and is also responsible for the development and direction of research aimed at improving current products and generating ideas for new gift planning products and services. She has particular expertise in Web content management and multichannel marketing technology. Bev graduated cum laude from Iowa State University in Ames, Iowa, with a Bachelor of Arts in journalism and mass communication. Before joining The Stelter Company in 1999, Bev worked at Meredith Corp. in Des Moines, Iowa, for more than 10 years where, most recently, she was managing editor of *Country Home* magazine.



Jay Steenhuisen is the founder of Steenhuisen Associates and co-founder of Covenant Calls, which have assisted numerous charitable organizations in soliciting hundreds of thousands of donors for bequest commitments. He has consulted with a variety of national charitable organizations, including The Nature Conservancy and the American Cancer Society, refining and refocusing their gift planning, major gift and marketing programs to meet the needs of donors at all wealth levels. Jay developed Brown University's philanthropic planning program within the principal gifts department. He served World Vision as private giving counsel, facilitating the philanthropic planning needs of its most significant donors. Prior to that role, he directed World Vision's Gift Planning Program, including all aspects of marketing and solicitation of planned gifts. He also served as director of philanthropic services for myCFO, a wealth management firm. Jay holds a BA from Seattle Pacific University, an MA in theological studies from Gordon Conwell Theological Seminary and an MBA from Pepperdine.



Nancy L. Stefani, CFRE, has a reputation as a leading authority on planned giving. She has conducted over 260 programs on the subject of wills and charitable giving for churches, organizations and institutions around the state and country. Her broad, working knowledge of all charitable giving plans has earned her the respect of not only donors, but accountants, attorneys and colleagues as well. A strong believer in continuing professional development, Nancy is highly sought after as a speaker and consultant on planned giving. She was the first person in the State of Iowa to become certified by the National Society of Fund Raising Executives, now known as the Association of Fund Raising Professionals. In 1987, Nancy co-authored a manual titled, *How to Conduct a Successful Wills Seminar*. In 2007, Nancy retired from Drake University as the Director of Planned Giving after 18 years of service. Prior to that, she held the position of Director of Planned Giving for the Catholic Diocese of Des Moines. Nancy joined The Renaissance Group, Inc. as a Gift Planning Consultant in January of 2007 and currently serves clients throughout Central Iowa.

CONFERENCE SCHEDULE



7:45 a.m. - 8:15 a.m.	Registration
8:15 a.m. - 8:30 a.m.	Welcome and Introductions
8:30 a.m. - 9:30 a.m.	Opening Keynote Session <i>"Never Decline a Gift Again: A Planned Giving Directory from A-Z"</i> - Presented by Bryan Clontz
9:45 a.m. - 10:45 a.m.	1st Concurrent Sessions <i>"Creative Charitable Planning with Non-Cash Assets: A Case Study Approach"</i> - Presented by Bryan Clontz <i>"Secrets from The Stelter Innovation Lab"</i> - Presented by Bev Hutney
11:00 a.m. - 12:00 p.m.	2nd Concurrent Sessions <i>"The Charitable Gift Annuity"</i> - Presented by Nancy Stefani <i>"Building a Balanced Gift Planning Program"</i> - Presented by Jay Steenhuisen
12:00 p.m. - 2:00 p.m.	Lunch Buffet and Keynote Address <i>Leave a Legacy Iowa, Presented by Rob Hilbert</i> <i>MIPGC Membership Opportunities, Presented by Sheila Kinman</i> <i>"Looking at the Unspoken Drivers of Planned Giving from a Major Gift Perspective"</i> - Presented by Jay Steenhuisen
2:15 p.m. - 3:15 p.m.	Closing Session <i>"Ripped From the Headlines! Lessons Learned When Angry Donors Sue"</i> - Presented by Johni Hays
3:30 p.m.	End of the Conference Drawing Complete your evaluation form and be entered to win a 2012 Conference Registration (two awarded) or a one night stay at the Hilton Garden Inn. Must be present to win!

CONFERENCE SPONSORS

Title Sponsor

- The Stelter Company

Lunch Sponsors

- Charitable Giving Resource Center, a strategic partner of Syverson Strege and Company
- Community Foundation of Greater Des Moines

Speaker Sponsors

- Brown Winick Attorneys at Law • Crescendo Interactive, Inc. • Hamilton, Juffer and Associates, LLP
- Ruffalo Cody • Iowa State University Foundation • PhilanthroPig • Thompson & Associates

Break Sponsors

- Renaissance Group, Inc. • Wilson, Deege, Dollar, Despotovich & Reimenschneider

Flash Drive Sponsors

- Leave A Legacy