

2008 Monthly Meeting Schedule and Chapter Information

mipgpc

Mid-Iowa Planned Giving Council

Providing educational opportunities, training, and other resources
designed to advance the field of gift and estate planning

National
Committee
on Planned
Giving®

Monthly Meetings and Spring Conference

Regular monthly meetings of the MIPGC are held at Iowa Lutheran Hospital located at the corner of East University and Penn Avenue in Des Moines. Each monthly meeting is held on Level B, Conference Room A, adjacent to the hospital cafeteria. All monthly meetings begin with a continental breakfast reception at 7:45 AM, with the program beginning at 8:15 AM and concluding at 9:30 AM.

January 22:

"Conversations with Donors"

Kaye Lozier, *Des Moines Community Foundation, Des Moines, IA (and donors)*; Kaye Lozier is the Director of Development for the Des Moines Community Foundation, whose purpose is to improve the quality of life in Greater Des Moines through philanthropy. Prior to her current position, Ms. Lozier worked as the administrative assistant to the president of the Iowa Senate, and was the first female president of the board of directors for the YMCA of Greater Des Moines.

February 26:

"Effectively Integrating Planned Giving Initiatives In a Major Capital Campaign"

Dan Saftig, *President, Iowa State University Foundation, Ames, IA*; Dan Saftig serves as president of the Iowa State University Foundation, an organization that generated more than \$100 million in gifts and commitments in the 2007 fiscal year. In October 2007, the ISU Foundation launched the \$800 million Campaign Iowa State: With Pride and Purpose, the largest comprehensive campaign in the university's history.

March 25:

"New Regulatory Rulings in Planned Giving"

Lou Harrison, *Partner Harrison and Held, Chicago, IL*; A frequent speaker and writer on tax and estate planning, Lou has authored more than 100 published articles on a broad range of tax and estate-planning subjects in legal, accounting, tax and estate journals and periodicals, and is co-author of the books, "Sorting Out Life's Complexities: What You Really Need to Know About Taxes, Wills, Trusts, Powers of Attorneys and Health Care Decisions" and "Illinois Estate Planning Forms and Commentary."

April 22:

(SPRING CONFERENCE)

"Case Studies in Planned Giving"

Pamela Jones Davidson, J.D., *President, Davidson Gift Design, Bloomington, IN*; Pamela Jones Davidson, J.D., is President of Davidson Gift Design, a consulting firm specializing in gift planning, planned giving program design and implementation, and training. Ms. Davidson is a past President of the National Committee on Planned Giving and served NCPG in various capacities during her six years on the Board.

May 27:

"Recording, Tracking, and Collecting Planned Gifts"

Susan Dame Green, *President of BIPS, LLC, Boston, MA*. Ms. Dame Green is the President of BIPS software, which counts and accounts for all Bequests and Planned Gifts. Ms. Dame Green has 23 years of experience in Planned Giving, having worked at three large national nonprofits, including the American Red Cross in Washington, D.C., St. Jude Children's Research Hospital in Memphis, TN and Childreach.

September 23:

"Maximizing Planned Giving Through Relationships with Financial Advisors"

Jamie P. Constantine, *CIMA, Sr. Vice President - Wealth Management, Citigroup SmithBarney, Des Moines, IA*. MIPGC member Jamie Constantine is a wealth advisor to high net worth individuals and families across the country as part of Citigroup SmithBarney's Private Wealth Management Group. Jamie will lead a panel of local financial advisors in a discussion of how gift planners can work with in tandem with advisors to best meet donors charitable and financial objectives.

October 28:

FALL CONFERENCE

November 25:

"Roundtable Discussions with MIPGC members"

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 dues cover expenses related to monthly meeting and the Spring Conference. Members receive a discount for the annual Fall Conference. MIPGC dues for 2008 are \$100. If you would like to become a member, please contact:

William Gustoff

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tel: 515-242-2430

Or download a membership application at:

www.mipgpc.org/membership

Visit our website @ www.mipgpc.org