

What is MIPGC?

The Mid-Iowa Planned Giving Council (MIPGC) is a professional association providing educational opportunities, training, and other resources designed to advance the field of gift planning and estate planning.

MIPGC is affiliated with the National Council on Planned Giving (NCPG).

Where and when does MIPGC meet?

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.



Leave a Legacy™

Leave A Legacy™ is a local and national education initiative of the Iowa Planned Giving Councils. Nonprofit organizations and professional advisors are encouraged to become partners in this effort to educate and encourage Iowans to include charitable gift tools in their estate plans. For more information, please fill out and return the form included in this brochure.

Membership Information

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 meetings, and the Spring Conference. Members also receive a discount for the Fall Conference. MIPGC dues for 2002 are \$80.

If you would like to become a member or to request more information, please contact Sandi Tuttle, Membership Chair:



Sandi Tuttle, CFRE
 Mercy Foundation
 1111 6th Avenue
 Des Moines, IA 50314
 515/643-8033
stuttle@mercydesmoines.org

Membership in MIPGC does not include membership in the National Council on Planned Giving. If you would like to become a member of the National Council on Planned Giving, please call 317/269-6274 or email ncpg@iupui.edu.

2002 MIPGC Board of Directors

Program Chair-Elect John Smith, Simpson College	Treasurer Paul Christoffers, Christoffers & Associates	President Sharyl Engelhardt, Wells Fargo Private Client Services
Government Affairs Mike Deege, Wilson, Deege, Dollar, & Despotovich	2002 Conference Chair Nancy Bobo, Easter Seals Iowa	President Elect Patrice Maurer, Blank Children's Hospital
Membership Chair Sandi Tuttle, Mercy Foundation	Conference Chair Elect Arvid Huisman, Iowa Newspaper Foundation	Past President Mary McEntee
Leave A Legacy Scott Brunscheen, Salisbury House Foundation and Bob Basham, Des Moines University	Program Chair Rob Hilbert, Alzheimer's Association	Secretary Lana Overturf, Salisbury House Foundation

2002 Meeting Schedule & 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





Mid-lowa Planned Giving Council

2002 Meeting Schedule

January 22, 2002

NIMCRUTS as a Retirement Planning Tool

Johnine Hays, J.D., CLU, FLMI, Director, Advanced Markets, Amerus Life, Des Moines, Iowa

This presentation will cover the retirement planning opportunities using the charitable technique of a Net Income with Makeup Provision Charitable Remainder Unitrust (NIMCRUT).

February 26, 2002

Four Charitable Case Studies that Actually Worked!

Don Ireland-Schunicht, Senior Vice President, Iowa Health Foundation, Des Moines, Iowa; and

Johnne Syverson, Partner, Syverson, Strege, Sandager & Company, West Des Moines, Iowa

This extended program (approximately two (2) hours) will cover four case studies ranging in subject matter from 401(k) Charitable Rollovers to S Corporations.

March 26, 2002

Overview of Four Different Charitable Gifts

Robert Lange, ChFC, Director of Institutional Advancement, University Lake School (ULS) Delafield, Wisconsin and Board Member of the National Committee on Planned Giving

Overview of four different charitable gifts that vary from retained life estates to antique automobiles to creative uses of life insurance.

April 23, 2002

Spring Conference

Steven L. Mourning, Executive Vice President, Kelmoore Investment Company, Palo Alto, California

He is a frequent speaker on general topics such as nonprofit governance, training for trustees and volunteers in the major gift and planned giving processes, and strategic planning and marketing for resource development programs. In addition, he created the *Ultimate Giving* concept which focuses on relationship-based fund raising practices and has taught extensively on that topic. He is the author of the *Moves Management* major/planned giving software package.

May 28, 2002

Anatomy of a Gift Annuity

Presenters to be determined

In this program, presenters will put forward information on the relationship donors and charities have when entering into a gift annuity, the legal aspects of a gift annuity (including state requirements). Sample gift annuity agreements will be provided.

June - August: No Meeting

September 24, 2002

101 Ways of Stewardship

Reine Shiffman, President, Reine A. Shiffman & Associates, Ltd., St. Paul, MN and Board Member of the National Committee on Planned Giving

Reine has worked in the non-profit sector for 25 years. She is past president of the Minnesota Planned Giving Council, is on the Editorial Board of the national publication *Planned Giving Today*, and is a member of the National Committee on Planned Giving's Research Committee.

October 22, 2002

2002 Fall Conference

Presenters to be determined

This annual day-long conference is a regional favorite. Each year nationally known speakers present a Basic Track for the planned giving novice and an Advanced Track for the more seasoned professional. Registration and conference details are announced in late summer. Space is limited. Conference fees are not included in MIPGC dues.

November 26, 2002

Panel Discussion: "You've got questions; we've got answers!"

Presenters to be determined

Don't be shy to ask questions here as we return to our MIPGC roots. This chapter's formation was based on professionals coming together to share information and insight in the planned gift field. Though we will have panelists, this discussion will be driven by those present.

Panelists to include an attorney, financial planner, fund development professional, and an insurance professional.

December 2002: No Meeting

Information Request Form

Name _____

Title _____

Organization _____

Address _____

Email _____

Phone (W) _____ (H) _____

Please send me a membership application for the Mid-lowa Planned Giving Council.

Please send me registration information for the April Spring Conference when it is available.

Please send me registration information for the October Annual Fall Conference when it is available.

Please send me information about Leave A Legacy.™

Return this form to the following address: MIPGC, 2643 Beaver Avenue, #116, Des Moines, Iowa 50310