2018/2019 Meeting Schedule

September 25, 2018 – Speaker: Bill Gustoff, J.D., FCEP (attorney at the Charitable Estate Planning Institute), "Charitable Options to Consider *Before* Old Mc Donald Buys the Farm"

October 23, 2018 – MIPGC Annual Fall Conference

November 27, 2018 – Speaker: Carlos Byrne (Vice President & Director of Relationship Management, BNY Mellon)

Carlos will present on engaging donors who give via commercial Donor Advised Funds, as well as "bunching" and its implications on charitable giving.

December 2018 – No Meeting

January 22, 2019 – Speaker: Phil Purcell FCEP, JD/MPA (Consultant for Philanthropy, LLC and Adjunct Faculty, Indiana University's Lilly School of Philanthropy)
This interactive session will review helpful gift planning techniques for farmers. Specific strategies to be discussed include outright gifts of land including undivided interests, remainder interests and bargain sales. Also, we will discuss gifts of tangible and intangible property: crops, livestock, equipment and mineral rights. Life income plans (gift annuities and charitable remainder trusts) using real and tangible property will be shared. Plus the session will include a review of more complex gifts such as conservation easements and charitable lead trusts. Questions are encouraged!

February 26, 2019 – Speaker: Nathan Stelter (Vice President of Development & Marketing, The Stelter Company) – Survey Says... Know Your Donors – It Pays to Ask
Most of planned giving marketing has largely been one-way focused communication...charities pushing information out to our donors. Surveys have long been a great tool for us to not only create more of a two-way dialogue with our donors, but better understand donor passion, donor receptiveness and ultimately identify new planned gifts!

This presentation will provide answers to common questions planned giving professionals are asking about survey tools and how to put them to best use in growing their planned giving program. No matter your nonprofit's size or sector you'll gain valuable information on:

- Why should your organization survey? What should you expect from surveying your donors?
- Who should you be surveying and what's the best format? How should you decide who's in and who's out?
- How often should you send surveys? Can you survey too much?

• How can the results of your organization's survey impact your planned giving program?

March 26, 2019 – Speaker: Scott Lumpkin (Principal, Scott R. Lumpkin & Associates, LLC), "What Your Boss Really Needs to Know About Gift Planning"
Increase your impact and productivity as a gift planner by helping your boss understand what planned giving is really about. Misconceptions about planned giving can keep your boss from understanding what you do as a gift planner and why, limiting your effectiveness and impacting your career. Scott Lumpkin draws on thirty five years in gift planning, including five years as vice chancellor of advancement at a major private university, to help you understand:

- How to elevate your role by repositioning the role of gift planning in your organization.
- How to turn your boss into an advocate for gift planning.
- How to make converts out of your colleagues.
- How to lobby for more gift planning resources.
- What your leaders need to know about planned giving donors & strategies, how to recruit and retain gift planners, and how to maximize gift planning success.

April 23, 2019 – Speaker: Christopher R. Hoyt (Professor of Law, Univ. of Missouri (Kansas City) School of Law), "Donor Advised Funds"

•What are Donor Advised Funds (DAFs)?
•What can DAFs do? (Permissible grants, Impermissible investments, distributions, benefits) •What's new with DAFs? (IRS Notice 2017-63 – pledges & bifurcated grants, Controversy, policy considerations
•How do DAFs compare to PFs?

May 21, 2019 – Speaker: Ashley E. Shafer, CFP ®, CAP ®, Financial Advisor, Family Wealth Advisor, Morgan Stanley
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