2024/2025 Meeting Schedule

MIPGC offers seven educational breakfast meetings and an annual conference each year. Save the dates as the full 2024/2025 schedule will be available soon!

In person Networking and Coffee – 8:00 – 8:30AM – As a member/guest you are welcome to stop by **La Mie Bakery** and grab a complimentary beverage and pastry prior to coming to the Playhouse. At checkout simply let the cashier know you are with MIPGC. La Mie Bakery, 841 42nd Street, Des Moines, IA 50312. (515) 255-1625

Education Program – 8:30 – 9:30AM – Regular monthly meetings of the MIPGC are held at the **Des Moines Playhouse, 831 42nd Street, Des Moines, IA 50312**. Enter from the east entrance and take the stairs or elevator to the second floor. Meetings take place in the West Lobby (facing 42nd Street).

September 24, 2024 -
The educational program will be provided by Joseph Nolte · Executive Director of Development for International Engagement at Iowa State University Foundation and MIPGC member. The topic of his presentation and discussion will be "Is There a Tax Deduction in My Closet? Charitable Gifts Using Unusual Assets"

October 15, 2024 – MIPGC Annual Fall Conference

November 19, 2024 - The Alphabet Soup of Philanthropy: IRAs, RMDs, QCDs, CGAs, ETC
Philanthropic gifts can play a crucial role in achieving personal charitable goals while also providing significant tax advantages, particularly through strategies involving Individual Retirement Accounts (IRAs), Qualified Charitable Distributions (QCDs), Charitable Gift Annuities (CGAs), and more. This not only helps in fulfilling philanthropic intentions, but it can also aid in strategic tax planning by potentially lowering overall tax liabilities. By integrating charitable giving into retirement strategies, individuals can enhance their financial well-being while making a meaningful impact on the causes they care about. This approach underscores the importance of aligning philanthropic goals with sound financial practices, ensuring that both personal values and fiscal responsibilities are met. It is important for advisors and fundraisers to understand these tools and how to work with donors to accomplish their goals.
Rhonda Fitchett Haas, JD, MBA, CFP
Senior Director of Development, Office of Gift Planning
Before joining the office of gift planning at the Iowa State University Foundation as a director of development, Rhonda Fitchett Haas was a financial consultant with AXA Advisors in Fort Dodge.

Previously, she was a trust and financial advisor with Wells Fargo. Rhonda holds a B.A. from Buena Vista College, a J.D. from the University of Iowa College of Law, and an MBA from Drake University. In addition, she has earned licenses and registrations, including series 7 and 66, and has achieved her designation as a Certified Financial Planner®.

January 28, 2025 - Blueprint for Success: Key Documents for a Thriving Planned Giving Program

In this session, we will explore the critical documents that form the foundation of a well-structured and compliant planned giving program. From bequest intentions and gift agreements to beneficiary designations and charitable trusts, we'll cover the must-have documents that help secure long-term success. Attendees will learn how to properly document and manage planned gifts, mitigate potential risks, and maintain transparency with donors. By the end of the presentation, participants will have a clear understanding of the documentation needed to build trust, ensure compliance, and maximize the impact of their planned giving efforts.

February 25, 2025 - Blueprint for Success: Key Documents for a Thriving Planned Giving Program

Presented and Facilitated by Caleb Hegna with highlights from MIPGC Members (It is really happening this time!)

In this session, we will explore the critical documents that form the foundation of a well-structured and compliant planned giving program. From bequest intentions and gift agreements to beneficiary designations and charitable trusts, we'll cover the must-have documents that help secure long-term success. Attendees will learn how to properly document and manage planned gifts, mitigate potential risks, and maintain transparency with donors. By the end of the presentation, participants will have a clear understanding of the documentation needed to build trust, ensure compliance, and maximize the impact of their planned giving efforts.

March 25, 2025 - Strategic Giving: Advisors and Nonprofits Working Together for Meaningful Impact

Presented by Kevin A. Shires, CFO & Director of Advisory Services with D.M. Kelly & Company and Matt Roberts, Chief Planning Officer with Syverson Strege

In this panel presentation, financial advisors Kevin A. Shires, CFP®, ChFC®, CFA, CFO & Director of Advisory Services with D.M. Kelly & Company and Matt Roberts, MFM, CFP®, CAP®, Chief Planning Officer with Syverson Strege will explore the important role advisors play in helping to advise, connect, and guide clients in incorporating philanthropy into their broader financial plans. They will also delve into the collaborative role advisors can play with nonprofit organizations, helping these entities understand the nuances of charitable giving and ways in which charities can provide further support to advisors. By fostering strong relationships with nonprofits, advisors can ensure that their clients' contributions are directed toward causes that align with their values, while also optimizing the benefits for both the client and the charity. There will be time for attendees to ask questions of Kevin and Matt.

April 22, 2025 - Motivational Strategies for Professional Renewal

Session Description:

Lisa Grefe brings her unique blend of trust expertise and personal resilience coaching to address burnout in fundraising professionals while clarifying the critical role of trust officers in estate planning. Drawing from her journey as both a Hall of Fame athlete and founder of The Comeback Project, Lisa will share motivational strategies for professional renewal alongside practical guidance for navigating executor requests. Her unique perspective on personal performance and transformation provides essential insights for planned giving professionals seeking to thrive while serving their donors with excellence.

Lisa Grefe serves as a Wealth Advisor and Trust Officer at First Community Trust, specializing in retirement planning, retirement income strategies, investment planning, estate planning and trust administration, while also founding The Comeback Project— to empower individuals to discover their inner potential and overcome life's challenges.

With 20+ years of unique experience in the areas of wealth management, human resources, psychology, and coaching, Lisa guides clients through financial transitions and personal transformations. A former semi-pro soccer player and First Team All-American goalkeeper, Lisa was inducted into her College Hall of Fame in 2014 and named All Iowa Soccer Coach of the Year in 2017.

Lisa's personal resilience journey—overcoming a serious ACL injury and later a debilitating neurological condition—informs her work as a motivational speaker and advocate. Lisa's impact was recognized with the 2024 Inspiring Advocate for Women Award from the Girl Scouts of Greater Iowa.

May 27, 2025 - The $4 Trillion Question: Expiring Tax Cuts, Looming Congressional Action and the Future of Philanthropy

Session Description:

With key provisions of the Tax Cuts and Jobs Act (TCJA) set to expire, Congress faces a critical decision—extend the cuts at an estimated cost of $4 trillion or seek alternate solutions. Its choices will have implications for charitable giving, estate planning, and the broader economy. This session will explore:

- Expiring TCJA provisions and their impact on donors and planned giving strategies
- Ways Congress might pay for extending tax cuts: spending reductions, potential tax increases, or new revenue measures
- The Charitable Act and other key policy proposals under discussion and their likelihood of passage
- What fundraisers and advisors need to know to help donors navigate potential tax law changes

Join me for a timely discussion on what's at stake and how the evolving legislative landscape could shape the future of philanthropy.

Lynn M. Gaumer, J.D., CAP® is the senior gift planning consultant for The Stelter Company and a board member of both the Mid-Iowa Planned Giving Council and the National Association of Charitable Gift Planners, where she previously chaired the Leadership Institute. She is also a member of NACGP's 2025 Government Relations Committee.

With over 25 years of experience in estate and charitable planning, Lynn has spent more than 13 years at Stelter, advising clients on technical planned giving matters and ensuring the accuracy of nonprofit marketing communications. She regularly presents technical webinars for Stelter, speaks at conferences nationwide on a variety of planned giving topics, and authors *Stelter's Expert Insights*, a publication covering trends and research in planned giving. Her expertise has also been featured in *Planned Giving Today*, where she has published two articles.

Before joining Stelter, Lynn spent a decade as an associate attorney specializing in estate and charitable planning.

She earned her B.A. in economics and communication studies from the University of Iowa and her J.D. from the University of South Dakota School of Law.