MIPGC
MID-IOWA PLANNED GIVING COUNCIL

SHAPING THE FUTURE TODAY

REGISTRATION INFORMATION

Oct. 25, 2016 | FFA Enrichment Center
DMACC Campus
Ankeny, Iowa

2016 MID-IOWA PLANNED GIVING COUNCIL FALL CONFERENCE

KEYNOTE SPEAKERS

Bryan Clontz, CFP®, CLU, ChFC, CAP, AEP, RICP
President, Charitable Solutions, LLC

Mae Hong, Vice President, Rockefeller Philanthropy Advisors

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BrownWinick Attorneys at Law

Conference Schedule

TIME	SPEAKER
8:30–9:00	REGISTRATION AND CONTINENTAL BREAKFAST
9:00–9:15	Welcome
9:15–10:15	Morning Keynote: Top 10 Trends Every Gift Planner Should Know, Bryan Clontz
10:15–11:15	**Breakout I** *Beginner/Intermediate:* Going From 0 to 60: A Crash Course for Gift Planners, Joe Nolte and Rob Kinsey *Expert:* Creative Charitable Planning With Non-Cash Assets, Bryan Clontz
11:15–11:30	BREAK
11:30–12:30	**Breakout II** *Beginner/Intermediate:* The Young and the Restless Prospect: Gift Planning for Donors Under 60, David Novak *Expert:* Iowa: Land of Opportunities…and Pitfalls, Paul Morf
12:30–1:00	LUNCH
1:00–1:30	Lunch Keynote: It's a Mad, Mad, Mad, Mad World: Trends in Philanthropy, Mae Hong
1:30–1:45	BREAK
1:45–2:45	**Breakout III** *Beginner/Intermediate:* Powerful Planned Giving With a Shoe-String Staff and a Shoe-String Budget, Bryan Clontz *Expert:* The Giving Talk: The Critical Role of Advisors in Supporting Philanthropy, Mae Hong
2:45–3:15	Closing Session—Ignite Speakers
3:15–4:15	Closing Reception

MIPGC
MID-IOWA PLANNED GIVING COUNCIL

Mid-Iowa Planned Giving Council (MIPGC)
MIPGC is a professional association providing educational opportunities, training and other resources designed to advance the field of planned giving 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 $110.

KEYNOTE

Bryan Clontz
Session: Morning Keynote
Title: Top 10 Trends Every Gift Planner Should Know

Bryan K. Clontz, CFP®, CLU, ChFC, CAP, AEP, RICP, is the co-founder and president of Charitable Solutions, LLC, specializing in noncash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management consulting, emergency assistance funds and life insurance appraisals/audits. He also serves as a senior consultant for Ekstrom Alley Clontz & Associates—a practitioner-based community foundation consulting firm in Connecticut, where he has had the pleasure of working with over 250 community foundations.

Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust—two national donor-advised funds focusing on noncash assets generally, and S-corp transactions specifically. These foundations have received over $400 million since formation. He is also the founder/president of The Emergency Assistance Foundation, Inc.—a national fund allowing employers to create emergency assistance and disaster relief funds for their employees.

From 1994 to 2003, he served as the national director of planned giving for Boys & Girls Clubs of America and then as vice president of advancement at The Community Foundation for Greater Atlanta. He received a Bachelor of Science in Business Administration from the College of Charleston; a master's degree in risk management and insurance from Georgia State University; and a master's degree in financial services from the American College. He is currently a candidate for the Ph.D. in retirement and financial planning.

For six years, he served as a graduate adjunct professor for both personal financial planning and life insurance in the Department of Risk Management and Insurance at Georgia State University. He has served or serves on the Editorial Board of the Planned Giving Design Center (2000-current), the Advisory Board for the American College's Chartered Advisor in Philanthropy Designation (2001-current), the American Council on Gift Annuities' Rate Recommendation and Research Committee (2003-2010) and the National Committee on Planned Giving Board (2007-2010). In 2014, he was named the Leon L. Levy Fellow in Philanthropy at the American College.

KEYNOTE

Mae Hong
Session: Lunch Keynote
Title: It's a Mad, Mad, Mad, Mad World: Trends in Philanthropy

Mae Hong is the vice president of the Midwest regional office of Rockefeller Philanthropy Advisors. In this role she is responsible for building RPA's presence in serving individual donors, families, foundations and corporations throughout the Midwest. Bringing 20 years of nonprofit and philanthropy experience to this role, her funding expertise includes children, youth and families; poverty alleviation; women and girls issues; and advocacy. She has also been actively involved in RPA's leadership on the issue of diversity in philanthropy.

Mae actively participates in local and national philanthropic associations and networks, serving in leadership roles on boards and committees, engaging in public speaking opportunities, and facilitating planning and execution of philanthropic initiatives. She is currently the chair of Grantmakers for Effective Organizations and also serves on the board of Illinois Humanities. She completed her graduate work in social service administration at the University of Chicago. Prior to entering the nonprofit sector, she worked in the publishing industry for several years following her graduation from Northwestern University's Medill School of Journalism.

Rob Kinsey and Joe Nolte

Session: 10:15–11:15 *Beginner/Intermediate*

Title: Going From 0 to 60: A Crash Course for Gift Planners

Rob Kinsey currently serves as executive director of development—gift planning at Iowa State University Foundation. He has 15 years of experience in fundraising, specializing in providing solutions that align donors' philanthropic interests with their financial and estate planning needs. He enjoys evaluating complex tax and estate planning issues to offer options while collaborating with donors and their advisors. He has raised millions of dollars for Boy Scouts of America, Ottumwa Regional Health Foundation, Simpson College and Iowa State University.

Rob enjoys sharing gift planning information with others and has presented for groups such as the National Association of Insurance and Financial Advisors (NAIFA)—Iowa, American Fundraising Professionals, Women in Philanthropy, the Mid-Iowa Planned Giving Council and many other local organizations.

Joe Nolte is director of development in the Office of Gift Planning for Iowa State University Foundation. Joe has nearly 20 years of fundraising experience, mostly with nonprofits in eastern and central Iowa. He is past president of the Mid-Iowa Planned Giving Council, and holds the Certified Gift Planning Professional certificate from Crescendo GiftCollege. He holds a BA from Mount Mercy College and an MBL from William Penn University, with additional study at the University of Wisconsin-Madison Graduate College. He lives in Des Moines with his wife, Joanne, and son, Eddie.

Bryan Clontz

Session: 10:15–11:15 *Expert*

Title: Creative Charitable Planning With Non-Cash Assets

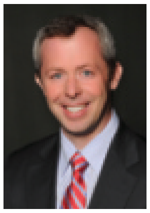
Breakout II

David Novak

Session: 11:30–12:30 *Beginner/Intermediate*

Title: The Young and the Restless Prospect: Gift Planning for Donors Under 60

David P. Novak, JD serves Lutheran Social Services of Illinois as vice president, advancement, and is executive director of The Cornerstone Foundation. Previously, he worked for Valparaiso University as director of gift planning, assisting alumni in all matters relating to major gifts and charitable estate planning. David has also held executive positions with the ELCA Foundation and Lutheran Social Services of Illinois. He has over 25 years of fundraising experience. Prior to his not-for-profit work, David worked as an attorney in private practice in Chicago, specializing in estate planning and probate. David received his JD degree from DePaul University School of Law.



Paul Morf

Session: 11:30–12:30 *Expert*

Title: Iowa: Land of Opportunities...and Pitfalls

After graduating from the Yale Law School in 1997, Paul Morf returned home to join his father at the firm of Simmons Perrine, which is now one of the largest law firms in Iowa, with nearly 60 attorneys. Paul chairs the firm's estate planning and trust practice group, and he also serves as the founding vice president of the Iowa Academy of Trust and Estate Counsel, as well as serving occasionally as an adjunct professor at the Iowa Law School, where he teaches upper-level classes related to estate planning, wills and trusts. Paul works regularly with business owners, farmers and wealthy families with respect to business succession and tax-sensitive estate planning.

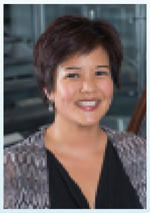
Paul particularly enjoys helping philanthropically-minded clients craft charitable legacies. He has served on boards for many local nonprofit organizations, and he currently serves on the board of the United Way of East Central Iowa and chairs its Planned Giving Committee.

Breakout III

Bryan Clontz

Session: 1:45–2:45 *Beginner/Intermediate*

Title: Powerful Planned Giving With a Shoe-String Staff and a Shoe-String Budget



Mae Hong

Session: 1:45–2:45 *Expert*

Title: The Giving Talk: The Critical Role of Advisors in Supporting Philanthropy

SHAPING THE FUTURE TODAY

Wrap up the conference with an inspiring exploration of our theme from some of our colleagues in gift planning in Iowa! Five individuals will give short presentations around the theme in a timed event—5 minutes, 20 slides, each slide automatically advancing every 15 seconds—to send us on our way ready to inspire philanthropy, inspire our colleagues and inspire ourselves. Join us for this story-packed send-off that showcases what is exciting and special about our field and about each other.

PRIZE DRAWINGS AND WRAP-UP

Registration Form

For more information, contact Conference Chair Tiffany K. Spinner at tspinner@iowapublicradio.org or (515) 725-1701.

Register online at www.mipgc.org/conference
or complete the form below and mail with payment to: MIPGC, 200 W. Second Ave., Indianola, IA 50125.

Name (Print your name as you would like it to appear on your name badge.)

Title/Certifications

Firm/Organization

Address | City, State ZIP

Phone Number | Email Address (Confirmation will be made by email.)

☐ Mid-Iowa Planned Giving Council member ☐ Association of Fundraising Professionals member

REGISTRATION FEES

Current Mid-Iowa Planned Giving Council members, Iowa or Association of Fundraising Professionals—Iowa members:

Received on or before Oct. 1..........$110
Received on or after Oct. 2..........$135

For nonmembers (groups listed above):

Received on or before Oct. 1..........$160
Received on or after Oct. 2..........$185
Additional nonmembers from same organization..........$135

Make your check payable to:
Mid-Iowa Planned Giving Council

Cancellation Policy

Cancellations made prior to Oct. 11 will incur a $50 cancellation fee. On or after Oct. 12, 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 the FFA Enrichment Center, 1055 SW Prairie Trail Parkway, Ankeny, IA 50023.
Registrants in need of overnight accommodations are responsible for their own hotel reservations. A block of rooms has been reserved until 5 p.m. on Oct. 6, 2016, at Courtyard by Marriott in Ankeny at a rate of $129/single room. Reservations can be made by calling (515) 422-5555; let them know you are with the Mid-Iowa Planned Giving Council.

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