2021/2022 meeting schedule

September 28, 2021 - "Getting Inside Your Donor's Mind! Science Based Strategies for Better Fundraising"

Speaker: Cherian Koshy, CFRE, AFP Master Trainer, Director of Development, Des Moines Performing Arts

Cherian Koshy is a Certified Fundraising Executive and AFP Master Trainer with more than fifteen years of experience in a variety of non-profits where he has successfully helped organizations connect thousands of donors to causes they care about and raise tens of millions of dollars from foundations, governments, businesses, and individuals in the process. He serves as the Director of Development at Des Moines Performing Arts, one of the nation's premier arts organizations. As a member of the advisory panel for Rogare: The Fundraising Think Tank at the University of Plymouth, he has written a number of articles and contributed to a number of papers on fundraising ethics, professional development, and philanthropy in the US. He has been appointed by the governor to Iowa's Commission on Volunteer Service where he helps advance legislation to support volunteerism and engage Iowans in volunteer activity. Nationally, he serves as a member of Association of Fundraising Professionals External Relations Committee as well as a regular presenter at the AFP International Conference and regional workshops on fundraising. Cherian was also one of the most successful debating coaches in the United States. His students won dozens of national and international championships. He is the author of one of the most widely used debating textbooks currently used and has taught thousands of students over the last twenty years.

October 19, 2021 – MIPGC Annual Fall Conference

November 23, 2021 - "A Legacy Donor Just Died. Now What?!?!"

Speaker: Fredrick B. Weber, Senior Wealth Advisor, National Estate Settlement Services Practice, Northern Trust Wealth Management

Your organization has spent years, perhaps decades, cultivating a large estate gift from a generous and reliable donor who has recently died. You attended the funeral, comforted the family and expressed your gratitude along with your condolences. Several weeks have now passed and you have heard nothing from the executor, the trustee or the attorney. Now what? Estate and trust gifts come in all shapes, sizes and degrees of difficulty. Executors, trustees, and the attorneys who represent them come with a wide range of variation in their fiduciary expertise, their work ethic, their level of transparency, their attention to detail, their commitment to the job, and their independence. Charities, while typically very worthy of a deceased donor's support, are sometimes viewed by the donor's family with indifference, suspicion and on occasion, outright hostility. Circumstances can be made even more challenging when an indifferent or hostile family member also happens to be the fiduciary responsible for the delivery of a charitable bequest. This presentation will explore some “ripped-from-the-headlines” case studies designed to illustrate some of the obstacles to productive working relationships among charitable beneficiaries and fiduciaries following the death of a donor, and how to avoid those obstacles, work around them, and ultimately, to overcome them.

January 25, 2022 - “Iowa and Des Moines Philanthropic Landscape"

Speaker: MIPGC member Eric Heininger, CFRE, President of EDEN+ Fundraising Consulting

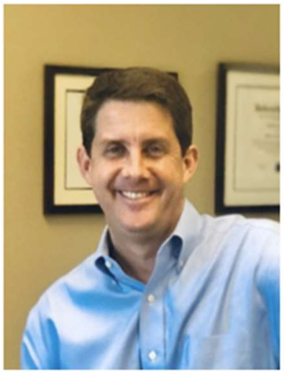
Learn more about the state of Iowa's philanthropic landscape. Iowa and Des Moines top so many lists by magazines and websites but can we truly prove that Des Moines is one of the most generous communities? Yes we can! This month's presentation at MIPGC will take a retrospective look at some data from 2021 that allows us to look at philanthropic and the financial health of our region in a qualitative way. There may be some surprises in the data that open our eyes to philanthropy beyond just our own organizations or those we serve. Additionally, we will have a discussion about what data we can collect as a community that would help us better inform non-profits, donors, legislative decision-makers, and our neighbors about our impact in our region. Your input will shape next year's publication!

February 22, 2022 - “DAF: The GOAT of Giving Solutions"

Speakers: Kristi Knous, President, and Jordan Richardson, Senior Charitable Giving Advisor, Community Foundation of Greater Des Moines

Kristi and Jordan will share an overview of donor advised funds as well as examples of strategies to be employed by donors, professional advisors and nonprofit professionals to leverage the flexibility and maximize the charitable impact of the giving tool that might be the greatest of all time.

Kristi Knous serves as the President of the Community Foundation of Greater Des Moines. Kristi is a Chartered Advisor in Philanthropy and a Fellow in Charitable Estate Planning. Kristi is responsible for carrying out the Community Foundation mission, oversees its operations and provides leadership in identifying and addressing issues key to the sustainability, viability and livability of the community. Jordan Richardson is the senior charitable giving advisor at the Community Foundation of Greater Des Moines. Jordan is a Chartered Advisor in Philanthropy and a 21/64 certified advisor. He works with professional advisors and their clients to promote and facilitate charitable giving. Jordan also oversees the Community Foundation’s Charitable Investment Partner program, corporate giving and nonprofit endowments.



March 22, 2022 - "Help Donors/Clients Get IMMEDIATE Tax Savings from Their Future Annual Charitable Gifts – Meet the “iCLAT”"

Speaker: Brad Gornto, JD, LLM – Founder & CEO of Gornto Law, PLLC & iCLAT Solutions, LLC0

Add tremendous value to your donors/clients who need tax savings NOW.

The sole purpose and objective of an iCLAT is simple. . . TO GENERATE A LARGE IMMEDIATE CHARITABLE INCOME TAX DEDUCTION IN THE CURRENT YEAR, which is based on your donors/clients’ future annual gifts to charity. While IRS interest rates remain at historically low levels, iCLATs can generate substantial immediate tax savings for your donors/clients, particularly for those who are already giving between $10,000 to $50,000/ year to one or more charities.

With an iCLAT there is no need for your clients to write a big lump sum check or transfer assets to charity (including to a donor advised fund) to get a large “up front” charitable deduction in the current year!

The term iCLAT is simply another name for what is technically known as a “reversionary” charitable lead annuity trust that is treated as a grantor-trust for income tax purposes. This simpler form of CLT has been around for 40+ years, but it has remained largely ignored by charities, advisors and other allied professionals until recently.

Attendee Takeaways:

Recognition of the 2 “Ideal Donor/Client Situations” for iCLAT Consideration

Understanding of Strategic Tax Mitigation Benefits from iCLAT for:
ROTH IRA Conversions
Large Compensation/Bonus/Commision Event♣ Sale of Business or Real Estate
Large K-1 Income
Inherited IRAs

Several Actual iCLAT Cases/Examples from 2021

Negative Impact of Potential Inflation/Rising Interest Rates on Tax Savings of iCLAT

“Tale of the Tape” Comparison: “Bunching” Annual Gifts to a DAF vs. iCLAT

Unique Asset Funding Using Special Assets (Cryptocurrency, Real Estate, LLCs)

Brad Gornto has practiced law throughout Florida for over 21 years in the areas of complex estate & charitable planning, business law, probate and trust administration, and income tax planning. In addition to his law practice, Brad is the President and Founder of Effectual Giving, LLC, which is a consulting firm that assists charitable organizations, philanthropic families, and allied professionals across the country in the actual implementation of effective charitable giving strategies. Finally, Brad is also the President and Founder of iCLAT Solutions, LLC, which specializes in design, drafting and consulting services of "reversionary" charitable lead trusts for individuals, entities, recipient public charities, private foundations and donor advised fund sponsors.

Brad earned his undergraduate degree (marketing) from Florida State University (1995), his law degree (J.D.) from the University of Florida College of Law (1998), and his LL.M In Taxation from the University of Miami School of Law (2000).

Brad's current volunteer service includes: (i) member of the Florida State University Foundation, Inc. Planned Giving Advisory Council; (ii) member of the Board of Directors of International Advisors in Philanthropy, Inc. ("AiP"); and (iii) incoming member of the Board of Directors of the National Association of Charitable Gift Planners. Brad is a past board member of the Down Syndrome Association of Central Florida and various other charitable organizations over the years. Brad and his wife of 21 years, Cindy, are happily raising their four children, Bryce, Owen, Joel & Daisy Grace.

This meeting has an option to attend by Zoom. If you have an interest in attending by Zoom and would like to know how you can participate, CONTACT US.

April 26, 2022 -

May 24, 2022 - "A Moves Management Love Story"

Moving prospects through the donor or client life cycle is similar to a good love story: even after the courtship, it's a lifelong journey of maintaining the relationship you worked so hard to build. But what does this truly look like? Regardless of how you interact with donors and clients (in-person, phone, email, social media or various other technologies), building relationships in a healthy manner is a must for your organization's longevity as well as your personal ethics as a gift planner or advisor. We'll discuss how to do this in a caring and thoughtful way, ensuring impact on your organization's mission for year to come.

Outcomes:
Learn elements of successful relationship building.
Understand opportunities for relationship building throughout all stages of the cycle.
Discuss donor and client interactions to further refine practices of healthy relationship building.

Lisa M. Chmiola, M.S., CFRE, has more than 20 years in philanthropic development. She has served in major and planned giving roles in education (public and private) and religious institutions, following initial career experience in event-based philanthropy. As Chief Fablanthropist for Fablanthropy (the intersection of fabulous and philanthropy), she works with nonprofit organizations and fundraising professionals providing consulting, training, and coaching services, particularly in legacy giving.

An AFP Master Trainer since 2014, Lisa has presented at four AFP International Conferences, and a variety of AFP and other industry association regional conferences, chapter meetings, and webinars. She serves as an adjunct instructor in Communication at the University of Louisiana at Lafayette and has taught in Rice University's Center for Philanthropy and Nonprofit Leadership.

Lisa is an active volunteer, serving on the U.S. Government Relations committee and the Emerging Leaders Task Force for AFP Global, as board member of the National Association of Charitable Gift Planners (and past president of the Houston chapter), as a committee chair for the AFP Baton Rouge Chapter, and is a graduate of Leadership Houston. Additionally, she has co-authored several pieces for AFP's *Advancing Philanthropy* magazine.