September 27, 2022 - Lessons Learned: Case Studies in Planned Giving in Our Community

Join us for a conversation with three experts who combined have seen it all! As a panel, they will discuss a few cases and offer anecdotes about the logistics, the storytelling, the relationships, the stewardship, when things go right or wrong, and the lessons we can all learn together. The panel will include our very own:

Johnne Syverson, CFP®, AEP®, CAP®
Joan Bindel MBA, CFRE
Ryan Crane, CAP

October 11, 2022 – MIPGC Annual Fall Conference
CLICK HERE for conference recap!

November 22, 2022 - Bring your topics, your issues, and your materials!

Workshop your printed materials and talk candidly about what is going on in your world.
We will have the space set up for small group discussions of 3-4 people at each table, and we will rotate.

January 24, 2023 - Santa Delivers Secure Act 2.0: QCDs to CRTs and CGAs

This presentation by our own Johnne Syverson, CFP, AEP, CAP will cover one of the newest opportunities in planned giving: qualified charitable distributions (QCDs) for life income gifts (CRTs and CGAs). He will cover the new rules, open questions, practical considerations, and case study opportunities.

This presentation will prepare you to:

- Learn the new Rules surrounding the Legacy IRA
- Discuss tax implications
- Discuss practical considerations of these donations
- Review the target donor market
- Discuss a number of open questions

- CAPTURE THESE GIFTS!!!

Johnne Syverson is the Executive Director of the *Charitable Giving Resource Center*, an independent consulting firm specializing in the implementation of various Planned Gift strategies on an outsourced basis. He has professional credentials as a Certified Financial Planner™ Practitioner (CFP®) and is one of only 2,100 practitioners in the United States who is credentialed as an Accredited Estate Planner (AEP). He was one of the first practitioners in the nation to be awarded the Chartered Advisor in Philanthropy® (CAP®) designation. With over 45 years' experience, Johnne serves as a resource to nonprofits, their donors and professional advisors in the area of charitable tax and estate planning, a strategy that enables individuals to increase their income, reduce taxes, and preserve their estate for their heirs and the charities of their choice.

He also serves as Vice President of Gift Annuity Services for *the National Gift Annuity Foundation* (NGAF), the largest independent sponsor for Gift Annuities in the country. NGAF hosts CGAs for nonprofits of all sizes when it no longer makes to host CGAs themselves due to size, fiduciary liability, or state regulations.

Johnne is a past president of the Polk County Estate Planning Council, past president of the Mid-Iowa Planned Giving Council, and past president of the International Association of Advisors in Philanthropy (AiP), and an active member in the National Association of Charitable Gift Planners (CGP). Johnne holds a Master of Science degree in Financial Services (MSFS) from the American College in Bryn Mawr, PA.

Johnne lives in Des Moines, IA who with his wife, Linda, have three children and nine grandchildren.

February 28, 2023 - New Opportunities with the Expanded IRA and a CGP Advocacy update for 2023

Michael Kenyon, President and CEO
National Association of Charitable Gift Planners

The IRA rollover has now been expanded to include life income gifts. Learn the specific limitations and opportunities this new legislation presents for donors and organizations. This presentation will also include an update on legislation that did not pass this year and CGP's ongoing activities and initiatives to improve and expand charitable gift planning.

Learning Objectives & Outcomes:

1. Legislative summary on the charitable giving provisions passed in the Consolidated Appropriations Act H.R. 2617
2. Specific limitations and conditions for eligibility of life income gifts in the recently passed legislation.
3. Summary of introduced bills to support charitable giving that did not pass in 2022 and plans for future reintroduction.
4. Review of CGP-specific initiatives, including requested change to the IRS Form 990, Section VIII and an update on efforts to improve the timely distribution of IRA beneficiary proceeds from financial institutions.

Michael Kenyon is president and CEO of the National Association of Charitable Gift Planners, the leading organization setting standards, providing education, resources, and advocacy for charitable gift planners. Joining the organization in 2012, Michael's responsibilities include overseeing the CGP staff based in Indianapolis, IN and working with a national network of nearly 90 councils throughout the country. He actively advocates for the over 6,000 CGP members to promote the value of charitable gift planning to legislators in D.C. and speaks throughout the country on the role of advocacy in the nonprofit sector. Michael has over 20 years executive leadership with community based, cultural, and professional membership organizations. He has recently served as Vice President for the Charitable IRA Initiative, co-chair of the Financial Awareness Foundation National Campaign and member of the international Board of Directors of the Percussive Arts Society.

March 28, 2023 - Essentials of special needs planning

An entire family can be impacted when a loved one has special needs or disabilities. Knowing where to start can be the hardest part. We'll help guide the way so you can focus on what matters most. Our educational workshop for individuals and families helps them learn how to get started and feel ready for their financial future. This discussion covers four key areas: family assets and planning, government benefits, employer benefits and legal planning.

Matt Stagner, CFP®, ChSNC®, CPFA, AIF©, ChFC©
AVP, Voya Cares Business Development, Voya Financial

Matt, an experienced financial planner and subject-matter expert, leads business development efforts for Voya Cares. He carries a number of industry designations and brings a background in investments, advanced financial planning concepts, Social Security strategies, IRAs and ERISA plans and trust planning. With Voya, he has worked to build and deliver financial planning resources and consulting services for employers, financial professionals, caregivers and people with disabilities and special needs. Matt also helps drive thought leadership, competitive integrated employment initiatives, and legislative advocacy efforts. Matt is a Registered Principal of Voya Financial Advisors, Inc. (member SIPC).

April 25, 2023 - Main Street Philanthropy: Everyday Inspiration for Non-Cash Giving

The vast majority of all charitable giving happens in the form of cash. While there is certainly nothing wrong with a checkbook or a credit card as a tool for philanthropy, our donors likely have many other resources available for making meaningful gifts. Understanding what those resources are and how to turn them into charitable gifts can feel complicated, but it doesn't have to be a mystery. Our donors' assets don't just live privately on a balance sheet. We can see them throughout the communities we call home.

Jordan Richardson
AIF®, CAP®, Senior Charitable Giving Advisor, Community Foundation of Greater Des Moines

Jordan leads the Charitable Investment Partner program by collaborating with professional advisors and their clients as they develop and implement charitable giving goals. Nonprofit organizations also rely on Jordan to support their endowments. Jordan is a Chartered Advisor in Philanthropy® (CAP®), a designation which provides expertise to guide charitable individuals and organizations in strategic philanthropic planning. Jordan is also a 21/64 certified advisor, specializing in facilitating conversations with individuals and multigenerational families, so donors can give and connect more effectively in their charitable giving.

May 23, 2023 - Insuring A Better World Fund

This presentation will include audience polling and additional individual audience member dialogue providing the solutions to three quick case studies, all designed to teach the audience how to maximize and recognize noncash gifts of life insurance. It then concludes with the "how to" take action and get started. Time is left for Q&A at the end.

Learning objectives:

- Transform charities' noncash gift acceptance policy and how to increase their noncash gifts.
- Learn the size of the life insurance market, how to access it and maximize its value.
- How to improve marketing efforts and relationships with donors and financial professionals.
- Provide compelling statistics, case studies and rationale.

David B. Simon is an attorney, and the co-founder and president of Insuring A Better World Fund. The Fund allows donors to transform unneeded life insurance policies to their philanthropic ideals and support the charities of their choice at no cost to the donor or charity. Insuring A Better World Fund is committed to increasing noncash gifts to charity. Its mission includes strengthening and enhancing the relationship between financial and planned giving professionals. David's life is fueled by the words of the sages "If I am not for myself, who is for me? If I am only for myself, what am I? If not now, when?" His devotion to philanthropy led to his collaboration with longtime friend, Robert Stuchiner, to form the Insuring A Better World Fund. The Fund has generated contributions to numerous charitable organizations providing scholarships, legal aid to the needy, money to combat disease, find cures and more. David, an engaging and entertaining speaker, has spoken at numerous webinars including the American College of Financial Services and conferences most recently Finseca and the Planned Giving Council of Palm Beach County. For decades David was a featured speaker at insurance company seminars as well as life insurance professional and bank gatherings across the United States. David is published in ThinkAdvisor on the 10 Top Ways to Use Life Insurance in Charitable Giving David began his career as a litigator. The Northridge Meadows case, arising out of the earthquake in California, and the Adames case, arising out of a shooting in Chicago, are among the notable actions David litigated. Mr. Simon has been active with many charitable organizations over the last 40 years. He has served on several charitable boards and currently serves on two boards. David is a graduate of the University of Michigan and earned his law degree from the University of California (Hastings).