MIPGC
MID-IOWA PLANNED GIVING COUNCIL

SHAPING THE FUTURE TODAY

REGISTRATION INFORMATION

Oct. 24, 2017 | FFA Enrichment Center
DMACC Campus
Ankeny, Iowa

2017 MID-IOWA PLANNED GIVING COUNCIL FALL CONFERENCE

KEYNOTE SPEAKERS

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

Phil Cubeta, MSFS, CLU®, ChFC®, CAP®
The Sallie B. and William B. Wallace Chair in Philanthropy at The American College of Financial Services

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Conference Schedule

TIME	SPEAKER
8:30–9:00	REGISTRATION AND CONTINENTAL BREAKFAST
9:00–9:15	Welcome
9:15–10:15	Morning Keynote: Advocacy Update/Tax Law Changes and What They Mean for Gift Planning, Michael Kenyon
10:15–11:15	**Breakout I** *Beginner:* Case Studies for Discussion, Phil Cubeta *Intermediate/Expert:* Reaping the Philanthropic Harvest: Opportunities for Gift Planning in Agriculture, Joe Nolte and Rob Kinsey
11:15–11:30	BREAK
11:30–12:30	**Breakout II** *Beginner:* Debunking 5 Common Myths Surrounding Planned Giving, Cheryl Sturm *Intermediate/Expert:* Invest in Her: Women, Wealth & Philanthropy, Ashley Shafer
12:30–1:00	LUNCH
1:00–1:30	Lunch Keynote: The Riley Case: Can This Case Be Saved?, Phil Cubeta
1:30–1:45	BREAK
1:45–2:45	**Breakout III** *Beginner:* Case Studies in Planned Giving, Kirby Hughes Gould *Intermediate/Expert:* Inspired Planning for Highest Capacity Donors, Phil Cubeta
2:45–3:15	Closing Session—IGNITE Speakers

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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 National Association of Charitable Gift Planners. 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

Michael Kenyon
Session: Morning Keynote
Title: Advocacy Update/Tax Law Changes and What They Mean for Gift Planning

As president and CEO of the National Association of Charitable Gift Planners, Michael strives to create an environment where CGP's 8,000 members can come together to educate, learn, network and advocate for the distinguished profession of charitable gift planning. Working closely with the CGP board, Michael helps develop and champion the organization's strategic vision, ensuring that CGP's budget, staff and priorities are aligned with its mission to serve charitable gift planners and bring to life the art and science of charitable gift planning. Michael currently serves as honorary co-chair for the 2017 Improving Financial Awareness Campaign and vice president for the Charitable IRA Initiative.

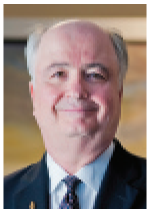
KEYNOTE

Philip Cubeta, MSFS, CLU®, ChFC®, CAP®
Session: Lunch Keynote
Title: The Riley Case: Can This Case Be Saved?

As the Sallie B. and William B. Wallace Chair in Philanthropy at The American College of Financial Services, Phil Cubeta, MSFS, CLU®, ChFC®, CAP® is responsible for the Chartered Advisor in Philanthropy® (CAP®) curriculum.

Prior to joining The American College of Financial Services, Phil served as chief of staff for The Nautilus Group, an elite unit of New York Life serving wealthy clients.

Phil has an M.A. in literature from Yale, an M.A. in philosophy and psychology from Oxford, and an M.S. in financial services from The American College of Financial Services. He is a past president of the North Texas Council of the National Association of Charitable Gift Planners.



Phil Cubeta

Session: 10:15–11:15 *Beginner*

Title: Case Studies for Discussion

Rob Kinsey and Joe Nolte

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

Title: Reaping the Philanthropic Harvest: Opportunities for Gift Planning in Agriculture

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 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, Association of Fundraising Professionals, Women in Philanthropy, the Mid-Iowa Planned Giving Council, along with 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 B.A. from Mount Mercy College and an M.B.L. from William Penn University.

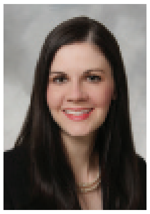
Breakout II

Cheryl Sturm

Session: 11:30–12:30 *Beginner*

Title: Debunking 5 Common Myths Surrounding Planned Giving

With over 30 years of global communications and marketing experience, Cheryl has strong expertise in strategic planning, market research and results measurement. Before joining The Stelter Company in 2013 as marketing research director, Cheryl worked for 10 years in the biotech industry and with Young & Rubicam Advertising's Midwest office as senior vice president, account group director. A graduate of Westmar College in LeMars, Iowa, with a B.A. in secondary education with an emphasis on economics, she also attended the Kellogg School of Management's marketing program for business executives and is a graduate of the American Marketing Association's advanced market research program taught at the University of Georgia.



Ashley Shafer

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

Title: Invest in Her: Women, Wealth & Philanthropy

Ashley Shafer is a financial advisor with The 801 Group at Morgan Stanley, a group with more than 120 years of collective experience in the financial services industry. Ashley focuses on working with nonprofits, their executive leadership teams and boards in areas of governance, investment asset allocation, investment and spending policy reviews and oversight/compliance with industry best practices and regulation. Ashley also advises individuals and families in helping achieve their wealth and legacy planning goals. Prior to joining Morgan Stanley, Ashley served as the director of affiliates and philanthropic partners at the Community Foundation of Greater Des Moines. Ashley is a graduate of Lake Forest College, where she double majored in business and studio art. In 2011, Ashley obtained her Certified Financial Planner™ certification and in 2012 received her Chartered Advisor in Philanthropy® designation.

Breakout III

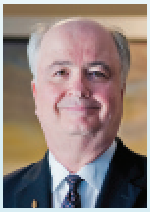
Kirby Hughes Gould

Session: 1:45–2:45 *Beginner*

Title: Case Studies in Planned Giving

Kirby Gould has been vice president for the Christian Church Foundation since 1997, with her office in Kansas City. She has achieved the certifications of CFRE, ChFC, CASL and CAP. Kirby has served on the boards of the Mid-America Planned Giving Chapter, the Mid-America AFP Chapter, and the national CGP board. She also served similar volunteer roles in Oklahoma.

Kirby is a contributing author to Planned Giving Today, and recently joined its editorial board. Kirby has spoken at several CGP (PPP) chapters and councils throughout the country.



Phil Cubeta

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

Title: Inspired Planning for Highest Capacity Donors

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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