Value-Based Planning: A Seminar for Professionals

Wednesday, May 18
Cedar Rapids Marriott

Schedule

11:30 a.m. **Check in**

12–1 p.m. **Lunch**

1–2 p.m. **Keynote: Planning that Benefits Clients, Charities, and Community**
Pamela Davidson

Your clients partake in charitable activities, often daily. The day's discussion will cover charitable plans that can further a client's estate, tax, retirement, and financial planning goals (both lifetime and testamentary); creative current uses of those plans; and real client stories.

2–2:15 p.m. **Break**

2:15–3:15 p.m. **What Motivates Donors?**
Ben Golding

Philanthropy works best when organizations and advisors help donors give to causes they care strongly about. Through deeper engagement and personal stories, we can create opportunities for more meaningful giving. Join us for an interactive session that will explore common donor motivations and how to relate to donors' passions.

3:15–3:30 p.m. **Break**

3:30–4:30 p.m. **Panel: How Integration Helps Donors**

Learn how professional advisors can help their clients integrate strategic, tax-efficient philanthropic planning into their financial, retirement, and estate preparation conversations.

Moderator: Paul Morf
Panelists: Chad Brandmeyer, Maureen Kenney, David Knutson, Gary Speicher, and Gary Streit

4:30–4:45 p.m. **Wrap up**

Registration fees

Regular rate $50

Employees/members of sponsor organizations $40

Continuing education

Three hours of continuing education credits for attorneys, CFP®s and insurance professionals are pending. Continuing education is provided by the Eastern Iowa Chapter of the Society of Financial Service Professionals. Continuing education credit is also pending for CFREs and is provided by United Way of East Central Iowa.

Register at uweci.org/seminar

Questions?
Contact Lois Buntz
319-398-5372 ext. 820
lois.buntz@uweci.org

Presenting sponsor

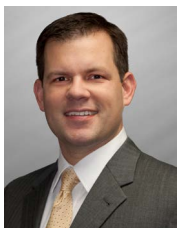
United Way
United Way of East Central Iowa

Speakers

Pamela Davidson, JD

Davidson Gift Design
Thompson & Associates

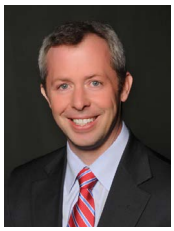
Pam Davidson is President of Davidson Gift Design, which specializes in gift planning, planned giving program design and implementation, and training. She is also Senior Vice President for Thompson & Associates, which offers nonprofits estate planning services. During her 30-year career, she has presented nationally to professionals, planned giving councils, estate and tax attorneys, accountants and financial planners, prospects, and donors about planned giving and charitable giving techniques.



Ben Golding

Advancement Resources

Ben Golding is COO of Advancement Resources and managing partner of Mindseye Project Partners. Ben consults with local, national, and international nonprofits on donor-centric development practices. Advancement Resources is the nation's leading nonprofit training firm for best practices in donor engagement.



Paul Morf, JD

Simmons Perrine Moyer Bergman PLC

Paul has been with Simmons Perrine Moyer Bergman PLC since 1998. He is the chair of the firm's trust and estates practice group, as well as Vice President of the Iowa Academy of Trust and Estate Counsel.

Chad Brandmeyer, CPA

RSM LLP

Chad has 16 years of experience providing tax advisory and compliance services for clients, focusing on strategic planning for tax efficiency and maximizing value to business owners.

Maureen Kenney, JD

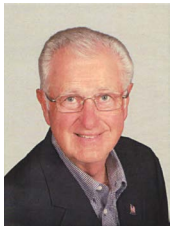
Bradley & Riley PC

For more than 20 years, Maureen has practiced law in the areas of corporate and business law, estate planning, probate, real estate, taxation, and trusts.

David Knutson, ChFC

Voya Financial Advisors

Dave has focused on local professionals' financial needs since 1981. He is the founder of The Charitable Giving Roundtable that later became the Eastern Iowa Planned Giving Council, a chapter of Partners for Philanthropic Planning.



Gary Speicher, CLU, ChFC

Premier Investments of Iowa

Gary is President of Financial Planning Services and has more than 47 years of experience in the insurance industry and more than 33 years in financial planning. He teaches retirement planning classes for faculty and staff of Kirkwood Community College, and cohosts a weekly radio show on WMT 600 AM and television program on KCRG.

Gary Streit, JD, CPA

Shuttleworth & Ingersoll PLC

Gary is President of Shuttleworth & Ingersoll, PLC. Since 1975, he has practiced law in Cedar Rapids with an emphasis in estate planning, estate and trust administration, employee benefits, and tax planning for individuals and small businesses.

Event sponsor

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