



PLANTING THE SEED OF
*Planned
Giving*

**MID-IOWA PLANNED GIVING COUNCIL
30TH ANNUAL FALL CONFERENCE**

October 11, 2022 | 8:00 AM - 4:00 PM
Greater Des Moines Botanical Garden

**“What is a legacy? It’s planting seeds
in a garden you will never see.”**

- Alexander Hamilton



Agenda

8:00 - 8:30 AM Registration and Continental Breakfast

8:45 - 9:00 AM Welcome | DuPont

Ryan Crane, MIPGC President

9:00 - 9:50 AM Opening Keynote | DuPont

Top 10 Charitable Trends Every Advisor Should Know in 2022

Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®

These top 10 trends have completely changed the charitable planning landscape. What are the hot vehicles and assets right now? How will demographics change charitable planning? What kind of grade should advisors get in working with clients on charitable plans? How are charities and advisors dealing with ubiquitous charitable planning information? These are just a sampling of the provocative topics that will be covered.

9:50 - 10:00 AM EXHIBITOR BREAK | DuPont

10:00 - 10:50 AM Concurrent Session 1

General
Walsh

Speak Up Stories: The Art and Science of Professional Storytelling

Erik J. Dominguez

We've repeatedly heard "Your Story Matters!" and "Share Your Story!" But not many know how to use storytelling to connect effectively. In this presentation, Erik will use case studies and brain-based science to equip you with the art and science of storytelling that leads to immediate results. Learn the 6S Storytelling Method® to identify your audience's actual needs and desires to deliver a story that not only captures their attention but leads them to action.

Advanced
DuPont

IRA Bequests – Simplifying Receiving Donors' Gifts

Johni Hays, JD, FCEP

Has your nonprofit experienced delays while attempting to collect IRA death proceeds when your donor passed away? Has it taken months or years to get paid? In this session, Johni will teach you how to avoid all this and find a quicker way to receive your gift.

10:50 - 11:00 AM EXHIBITOR BREAK | DuPont

11:00 - 11:50 AM Concurrent Session 2

General
Walsh

Charitable Giving With Ag Assets

Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®

As farmland and commodity prices rise, more agricultural gifts are being incorporated into charitable plans. This interactive session will cover all the charitable agricultural asset opportunities hidden in plain sight (or underground). Case studies will include donations of farmland, farm equipment, cattle, oil/gas interests, crops and business interests in farms.

Advanced
DuPont

What Artificial Intelligence Is Teaching Us About the Real Motivations Behind Generosity

Nathan Chapell, MBA, MNA, CFRE

Using the latest deep learning techniques and \$5.5 billion in giving transactions, we know more about the data that drives charitable decisions than ever before. Join Nathan Chappell for an engaging conversation about the changing landscape of generosity and its implications to the average nonprofit. Nathan will discuss insights and observations that he and his team of data scientists have found related to various giving strategies, including key observations about planned giving donors.

11:50 - 12:15 PM

LUNCH BREAK | DuPont | Pick up your boxed lunch to enjoy during our lunch keynote presentation.

12:15 - 1:00 PM

Lunch Keynote | DuPont

Conversations About Death and Other Elephants in the Room

Jann E. Freed, PhD

When talking about legacy giving with your donors, do you know what to say and how to say it? Death is not an easy conversation for many but having the tools to make it meaningful for the donor and the nonprofit can mean the difference between getting the gift—or not.

1:00 - 1:15 PM

EXHIBITOR BREAK | DuPont

1:15 - 2:00 PM

Combined Session | DuPont

The Changing Climate of Charitable Giving

Lynn M. Gaumer, JD

There is never a dull moment in either Washington—or the economy. Some of the many unpredictable things in our nation's capital and beyond include the fate (and final form) of the proposed legislation, inflation, GDP and the stock market. In this presentation, Lynn will help fundraisers better understand these factors so they can address their donors' concerns and prepare for their organization's future.

2:00 - 3:00 PM

Concurrent Session 3

General
Walsh

Ready, Set, Go! Do You Have Your Policies in Place?

Joan M. Bindel, MBA, CFRE

So, you're ready to ask for support—but have you dotted the i's and crossed all the T's? Learn from a colleague who has been down that road and knows which policies are MUSTS prior to making the ask.

Advanced
DuPont

Impact the Future, Today

Matt Moglestad, CFP®, CIMA®, AIF®, MBA

Endowments and Planned Giving. Both are designed to impact the future. How do they work together to bring long-term stability to nonprofit organizations? How can planned giving experts communicate effectively about endowments and the stewardship of the underlying investment pool?

3:00 - 4:00 PM

Closing Reception | Bankers Trust Veranda

Let's Grow Our Connections!

Enjoy an outdoor reception with colleagues and new friends, PLUS, enjoy a free drink at our house plant potting bar, courtesy of your friends at the MIPGC!

Keynote Speakers



Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®
Founder and President
Charitable Solutions, LLC

Bryan is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, actuarial gift annuity risk management consulting, emergency assistance funds, as well as virtual currency and life insurance appraisals/audits. He also serves as Senior Partner of Ekstrom Alley Clontz & Associates, a community foundation consulting firm in Tuscon, AZ. Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust, two national donor advised funds focusing on non-cash assets generally and S-corp transactions, respectively. He is also the founder and president of The Emergency Assistance Foundation, Inc., a global charity that allows employers to create emergency assistance and disaster relief funds for their employees. Finally, Bryan created the National Gift Annuity Foundation, the largest national independent gift annuity platform.



Jann E. Freed, Ph.D.
Leadership Development Consultant

Jann is a leadership development consultant who helps engage employees, develop leaders and helps people find meaning on a daily basis. She does this through leadership coaching, corporate workshops and speaking. Jann's focus is helping individuals and organizations get from where they are to where they want to be at every age and stage of life. Jann is the author of several books and articles about continuous improvement. Her latest book "Leading with Wisdom: Sage Advice from 100 Experts" is based on more than 100 interviews with thought leaders in the field of leadership. Her forthcoming book is titled "Breadcrumb Legacy: How Great Leaders Live a Life Worth Remembering." She writes a column in Training Magazine called "Leading Edge" and has a monthly podcast, *Becoming a Sage*, where she interviews leading authorities in the field of conscious aging.

Session Speakers



Joan M. Bindel, MBA, CFRE
Vice President of Philanthropy
MercyOne Des Moines Foundation

Joan Bindel is the Vice President of Philanthropy for MercyOne Des Moines Foundation where she serves as a major gift officer, planned giving officer and operations leader. She earned her Certified Fund Raising Executive (CFRE) designation in 2017 and has 30 years' fundraising experience serving health care, higher education and religious organizations. She is past board member, conference chair and program chair for Mid-Iowa Planned Giving Council as well as a variety of community and state-appointed boards.



Nathan Chapell, MBA, MNA, CFRE
Senior Vice President
DonorSearch Ai

Nathan is one of the world's foremost experts on the intersection between Artificial Intelligence and philanthropy. He serves as Senior Vice President of DonorSearch Ai, where he leads deep learning deployments for some of the nation's largest nonprofit organizations. Nathan is co-author of "Generosity Crisis, The Case for Radical Connection to Solve Humanity's Greatest Challenges" being published by Wiley in Fall 2022. His subject matter expertise has been featured in several publications, including Fast Company, Forbes, The Chronicle of Philanthropy, University of Notre Dame and the Association of Healthcare Philanthropy. In 2021, Nathan founded Fundraising.Ai as a member-centric collaboration of nonprofit professionals with a focus on data ethics, data equality, privacy, security and sustainability.



Erik J. Dominguez
Speaker, Educator, Coach
Speak UP Stories

Erik is a speaker, communications consultant, confidence expert, executive mentor and emotional intelligence facilitator. He has spent over 25 years helping others craft and deliver their personal and professional stories. He believes that everyone can speak up their story with power, confidence and fun!

Session Speakers



Lynn M. Gaumer, JD
Senior Gift Planning Consultant
The Stelter Company

Lynn is the senior gift planning consultant for The Stelter Company. She has over 25 years of experience helping individuals with their estate and charitable planning. She has been with Stelter for over 10 years, assisting clients with technical questions related to planned giving and ensuring the content Stelter creates for their nonprofit partners' marketing communications is legally accurate. Lynn presents a handful of complimentary technical webinars each year for Stelter and is a frequent speaker on a variety of planned giving topics for nonprofits nationwide. She worked as an associate attorney for 10 years, specializing in estate and charitable planning. She is the past president and board member of the Mid-Iowa Planned Giving Council (2014-present). She is a member of the National Association of Charitable Gift Planners' Leadership Institute and currently serves as chair.



Johni Hays, JD, FCEP
Executive Vice President
Thompson & Associates

Johni has more than 28 years of experience as an attorney in charitable and estate planning. She is an Executive Vice President with Thompson & Associates where she designs values-based charitable estate plans for donors. She served as the president of the Charitable Estate Planning Institute and she is the author of the book, "Essentials of Annuities" and co-author of two books, "The Tools and Techniques of Charitable Planning" and "Message From the Masters—our Best Donor Stories that Made a Difference." Johni serves on the Smithsonian's Professional Advisors Network in Washington, DC. In 2021, she was inducted into NCGP's Hall of Fame and received their Distinguished Service Award in 2020. She also served on its board of directors and has been a charter member of its Leadership Institute.



Matt Moklestad, CFP®, CIMA®, AIF®, MBA
Lead Advisor - Institutional
Foster Group

Matt is a Lead Advisor working primarily with Foster Group's institutional clients (nonprofits and retirement plans). He also serves on the firm's Investment Committee and Investment Strategy Group. He has worked in the investment industry for more than a decade and, prior to joining Foster Group, worked at a global financial company. He is a Certified Financial Planner®, a Certified Investment Management Analyst® professional, an Accredited Investment Fiduciary®, has completed the Endowments and Foundations Consulting course from the Investments & Wealth Institute (formerly IMCA), and has completed the Fundamentals of Alternative Investments Certificate program from the CAIA Association. He received his bachelor's degree in Marketing and Management at Grand View University and completed his MBA at Drake University.



The Mid-Iowa Planned Giving Council (MIPGC) is the professional association in Central Iowa for people whose work includes developing, marketing and administering charitable planned gifts. Those people include gift planners, attorneys, accountants, trust officers, financial planners, chartered life underwriters, volunteers and resource development officers from area nonprofit organizations. MIPGC is the central Iowa affiliate of the National Association of Charitable Gift Planners.

To become a MIPGC member or request more information, please complete the online membership application at www.mipgc.org/membership.

Membership is just \$110 annually.



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