



Board of Directors

- Lora Phelps, President (417) 358-7610
- John Wagner, Vice President (417) 862-8304
- David Dillon, Treasurer (417) 625-2044
- Tracy Gipson, Secretary (417) 626-0984
- Doug Crandall (417) 623-3424
- Chris Dumm (417) 623-2062
- Melissa Eiken (417) 624-4515
- James Hardy (417) 782-4919
- Sandie Morgan (417) 623-2654
- Shawn Naccarato (620) 235-4863
- Amanda Schmelzer (417) 347-6657
- John Tiede (417) 625-9503

All board meetings will be posted on the web site: www.plannedgivingcouncil.org. All members are welcome to attend these board meetings.

Membership Minutes

The Planned Giving Council of the Four States would like to take this opportunity to thank the Southwest Missouri Estate Planning Council for once again hosting the Memorial Day tab. This was the second year for the Memorial Day tab insert emphasizing the importance of Estate Planning. Thank you to all the professionals who contributed articles and to all the organizations who placed paid advertising in the insert. The tentative date for next year's edition will be Sunday, May 24, 2009.

We would also like to express our thanks to the Southwest Missouri Estate Planning Council for inviting our membership to a joint meeting on September 16, 2008. Those in attendance were impressed with the presenter, Mr. Bo Lee, the content of the program and the nuts and bolts application that it had to their organizations.



LEAVE A LEGACY®

The Planned Giving Council of the Four States is planning our 2009 calendar year. We want to bring to our membership a full-one day event tentatively planned for May 28, 2009. We are planning a joint session and then several break-out sessions to choose from. We would like to fulfill our mission with this program which is to exchange information, facilitate charitable giving and advance expertise for planned giving professionals. We would like to have this event become an annual one where our membership could network with other professionals in the planned giving arena. We are working on setting up an online registration at our web site. More information about this event will follow.

We are also discussing hosting Lunch and Learn programs that will be held in neighboring towns and another joint program with the Non-Profit Alliance which is part of the Joplin Area Chamber of Commerce. If you would like to help with the planning of these programs, please contact Chris Dumm, Shawn Naccarato or Lora Phelps, with the Program Committee.

Quality programs take time and money to make happen. We are searching for sponsorships to make these programs the best possible. If your organization would be interested in sponsoring our all day event or another event this next year, please call or email Lora Phelps.

National Committee on Planned Giving®

LEGISLATIVE BULLETIN

October 3, 2008

IRA Charitable Rollover Extension Signed into Law (10/03/2008)

NCPG is very pleased to report that President Bush has now signed into law the Emergency Economic Stabilization Act of 2008 ([H.R. 1424](#)), which includes an extension of the IRA Charitable Rollover. The extension is retro-active, applying to distributions made throughout both the 2008 and 2009 tax years. The extension will allow individuals 70½ and older to donate up to \$100,000 from their IRAs to charities tax-free. It does not expand the IRA Charitable Rollover to allow tax-free donations to spilt-interest gifts.

The Senate approved H.R. 1424 on Wednesday, and the House followed suit this afternoon. Within two hours of the House vote, President Bush signed H.R. 1424 into law.

Please visit the [NCPG web site](#) for the latest developments.

The above bulletin was received from the National Committee on Planned Giving to all NCPG members. If you are a member of our local council only, you may not get these updates. It would benefit you and your organization to visit this web site often for the latest news concerning planned giving.

Several of our members are up for renewal in the next few weeks. Please consider rejoining our council. We are constantly striving to get you the information you need to promote planned giving in your business, whether you are a professional member or a not-for-profit. Our local dues are currently at the initial start up cost of \$45.00. The National dues are \$160.00. You can join both organizations for \$165.00. Renewing or joining is easy. Simply go to: www.ncpg.org, click on membership, and click on join/renewal. We are listed under Four States, (MO, AR, KS & OK) Planned Giving Council of. Choose the membership status you desire and enter your credit card information.