



**Board of Directors**

John Wagner, President	(417) 862-8304
Shawn Naccarato, V President	(620) 235-4863
David Dillon, Treasurer	(417) 625-2044
Tracy Gipson, Secretary	(417) 626-0984
Chris Dumm	(417) 623-2062
Melissa Eiken	(417) 624-4515
James Hardy	(417) 782-4919
Lora Phelps	(417) 358-7610
Amanda Schmelzer	(417) 347-6657
Lori Smith	(417) 624-0600
John Tiede	(417) 625-9503

**All board meetings will be posted on the web site: [www.plannedgivingcouncil.org](http://www.plannedgivingcouncil.org). All members are welcome to attend these board meetings which meet on the first Wednesday of the month at Abbey Title Company.**

# Membership Minutes

On Wednesday, May 6, 2009 the Planned Giving Council of the Four States Board accepted the resignation of Doug Crandall from our Board of Directors. Doug served on our council from its conception. Doug will be truly missed, but we look forward to seeing him at our programs in the future.

Doug's resignation leaves a vacancy on our Board of Directors. This board position does not expire until May 31, 2011. Board elections are held each May. If you are a member of the Planned Giving Council of the Four States and would like to serve on our board, please contact John Wagner, President.

Lori Smith, Wachovia Securities, rejoined our board on May 6, 2009. Welcome back, Lori! John Wagner was elected President, Shawn Naccarato, Vice President. Jim Hardy, Shawn Naccarato, Amanda Schmelzer and John Wagner were elected to serve new three year



## LEAVE A LEGACY®

The Southwest Missouri Estate Planning Council will once again sponsor an Estate Planning Tab in the Sunday, May 24, 2009 edition of the Joplin Globe. This is the third year for the tab. David Dillon and John Wagner have been heading up the project. Local professionals have submitted articles to address different estate planning topics.

The Planned Giving Council of the Four States will purchase a full page LEAVE A LEGACY® ad in the estate planning tab. The ad will feature the names of our current membership. We will also have the Leave a Legacy® ad in the Senior Outlook. LEAVE A LEGACY® puts a personal touch on the importance of estate planning. With proper planning, everyone can make a difference!

Good news for charities. "On April 22, 2009, Sens. Byron Dorgan (D-ND) and Olympia Snowe (R-ME) introduced the Public Good IRA Rollover Act ([S. 864](#)). This legislation would make the IRA Charitable Rollover permanent, remove the \$100,000 annual limit on donations, provide IRA owners with a planned giving option starting at age 59½, and allow for distributions to supporting organizations, donor-advised funds, and private foundations. S. 864 has 11 original cosponsors, including four Democratic members and one Republican member of the Senate Finance Committee. Companion legislation ([H.R. 1250](#)) was introduced in the House last month." Quote taken from Legislative Update provided by Partnership for Philanthropic Planning. For more legislative updates visit [www.pppnet.org](http://www.pppnet.org).

### 1<sup>st</sup> Annual Tools of the Trade Series

*Presented by*

Planned Giving Council of the Four States

*Sponsored by*

**UMB Bank**

**Thursday, May 28, 2009**

**8:00 a.m. – 3:00 p.m**

**MSSU Plaster Hall (Formally Matthews Hall)**

- 8:00-8:30** Registration-Plaster Hall Lobby
- 8:30** General Session –Cornell Auditorium  
**Philanthropy Among the Wealthy** *Presented by Andrea Stewart-Douglas, Bank of America*
- 10:00** **Choose two Breakout Sessions**
- 10:00-11:00 **NIMCRUTs: A Special Charitable trust ideal for hard to sell assets.** *Stephen K Lehnardt, JD LLM*  
**Stewardship & Recognition.** *Louise Secker, Lafayette House & Shawn Naccarato, PSU Foundation*
- 11:00-12:00 **Pitfalls of Trust Administration.** *Clint Patterson & Kevin Conley, UMB Bank*  
**Charitable Giving Toolbox.** *Jeffery Kaiser, Bank of America*

### LUNCH Sponsored by UMB Bank

- 1:00 Choose one break out session  
**Lifetime Grantor Charitable Lead Trusts.** *Christopher Dumm, JD*  
**Marketing Your Program & Cultivating Relationships.** *Ed Roberts & David Alexander, Salvation Army*

2:00 General Session-**Stump the Experts**

**Please register online at [www.plannedgivingcouncil.org](http://www.plannedgivingcouncil.org).**

\$25 for members and \$50 for non members.

CE and CLE credits available.