

**Board of Directors**

Shawn Naccarato, President	(620) 235-4863
Michelle Ducre, Vice President	(417) 359-5534
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
Louise Secker	(417) 782- 1772
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 Abhev Title Company.**



**LEAVE A LEGACY®**

Our new council phone number is 417-359-5534. The toll free council phone number is 1-877-359-5534. Thank you to Michelle Ducre for offering the Community Foundation of Southwest Missouri's phone number to field calls on behalf of the Planned Giving Council of the Four States.

The Planned Giving Council of the Four States is also in the process of updating our website. If you are new to the council or if you have not visited our web site in a while, our web address is [www.plannedgivingcouncil.org](http://www.plannedgivingcouncil.org). One of the updates we will provide is a registration page that will allow participants to pre-register for programs. This will enable us to be more efficient in getting materials ready for programs.

The Planned Giving Council of the Four States will be bringing a Virtual Seminar to our membership in the first part of 2010. The Virtual Seminar is titled "Insurance Boot Camp". This seminar will cover best practices for an insurance gift program. The program will offer 1.5 hours of CFP and CRFE credits. Our council is applying to the Missouri State Insurance Board as well as the Missouri Bar Association for additional CE credits in these professions. Our council and the Southwest Missouri Association of Insurance and Financial Advisors are working together to come up with a date, time and location for the event.

# Membership Minutes

The Planned Giving Council of the Four States has had a few additions and changes to our board in the past few months. Louise Secker joined our board in May of 2009. She will be fulfilling a two year term. Louise is currently the Director of Community Services at the Lafayette House in Joplin, Missouri. Welcome, Louise!

John Wagner resigned from our board in September of this year. He was actively serving as our council President. John accepted a new position with the Salvation Army and has moved to St. Louis. We will miss his involvement with our board. We wish John all the best!

Michelle Ducre, Executive Director of the Community Foundation of Southwest Missouri joined our board upon John's resignation. Welcome, Michelle!

Shawn Naccarato was nominated and voted on to fill the position of council President. Michelle Ducre was nominated and voted on to fill the position of council Vice President.

In May of 2010, three positions on our board will need to be filled. If you are a member of the Planned Giving Council and would like to serve on our board, please contact Shawn Naccarato and let him know your interest. We need both professional advisors and charitable gift planners on our board of directors.

Mark your calendars for June 3, 2010. The 1<sup>st</sup> Annual Tools of the Trade Series that the Planned Giving Council presented in May of 2009 was a success. We would like to thank UMB Bank for their sponsorship of this event. We had people attend from the four state regions who are not currently members of our organization. We are currently in the process of planning our 2<sup>nd</sup> Annual Tools of the Trade Series. Next year's 2<sup>nd</sup> Annual Tools of the Trades Series will be held on the campus of Pittsburg State University. If you would like to be a part of the planning team, join us at our monthly board meetings. We have two committees working on the planning: professional advisors and non-profits. This ensures that both professions will have information that is useful to them in their respective professions.

Michelle Ducre will be enlisting the Joplin Chamber's non-profit alliance's help with a survey. We are asking them to help us meet our goals and objectives by telling us what they as a group need from us regarding charitable gift planning. We will use the results of the survey to plan topics for the 2<sup>nd</sup> Annual Tools of the Trade Series. If you are a member of either group or both, please help us by filling out the survey. This will ensure that we host programs that will benefit not only the non-profit sector, but the professional advisors as well. If you would like an opportunity to fill out a survey, please contact one of our board members and we will email a survey to you.