

EXCITING PROFESSIONAL ADVISOR OPPORTUNITY TO PROMOTE CHARITABLE GIVING

The Hardin County Community Endowment Foundation is partnering with the Iowa Council of Foundations and The Stelter Company to offer a FREE strategic webinar series on innovative charitable gift planning solutions and foundation services to attorneys, CPAs, and financial planners in Hardin County.

The sessions are being conducted by Johni Hays of The Stelter Company and meet several continuing education requirements. Johni Hays is the Senior Planned Giving Consultant for the Stelter Company. She graduated cum laude with a Juris Doctor degree from Drake University in 1993.

The first webinar is Tuesday, November 9, Noon – 1 p.m. The topic is: “*Plan on It: Hot Topics in Charitable Gift Planning & How Community Foundations Can Serve You*”. The session will review of legislative implications for charitable gift planning, the latest statistics on charitable gifts, information on life income gifts, details about Endow Iowa Tax Credits and information about how community foundations, like the Hardin County Community Endowment Foundation, can serve you - the professional advisor. This webinar meets requirements for CPEs, is approved for CLEs & is pending acceptance by the CFP Board for CEs.

The second webinar is Friday, November 12, Noon – 1 p.m. The topic is: “*Plan on It (The Sequel): Ethical Issues in Charitable Gift Planning*”. During this session, there will be a discussion of the importance of ethics in gift planning, a donor’s bill of rights, and a variety of charitable gifting scenarios. This webinar meets requirements for CPEs, is approved for one hour of CLE ethics credit & is pending acceptance by the CFP Board for CEs.

To register for either or both of the webinars, go to:
www.iowacommunityfoundations.org/planonit

For further information or questions regarding the webinars, contact Carol Gilbert, HCCEF Chair at 515-855-4170.