

SCNCPG
Minutes
July 22, 2005

Present: Baker, Grimes, Fischer, Frederick, Hershberger, Hoskins, Matthies, Moormann, Marrinan, Pfeil, Pickarski, Patsiavos, Rosenthal, Stevens, Strawn, Swaney, Sweeney, Timmons, Martin, Evans, White, Stark, Britton, Demaree, DeRoss, Leonard, Valentine, Deitrick, Naulty, Edwards

Motion: Approve the minutes of May 27, 2005.
Ron Timmons / Dick Matthies passed unanimously

Tabloid SCNCPG will publish a tabloid: "A Guide to Charitable Giving in Clark County" on Sep. 29, 2005. 33,000 copies will be inserted in the News / Sun. Local professionals will author 12 articles to heighten the awareness of "gift planning".

Wash,
Update Timmons discussed several issues before congress: Public Good Rollover Act, Noncash Charitable Giving, Insurance Gifts, & Spousal Right of Election. Handouts were provided to attendees.

2005
Programs Marrinan announced the upcoming seminar on Oct. 18th. Laura Hansen Dean presenting "Challenges Facing Charities in Tough Econ Times".

Next meeting Sept 23, Catherine Springer will present: "Nonprofit Professional Staffing".

Treasurer
Report Matthies reported that the LEAVE A LEGACY® program has a balance of \$ 6,035 and SCNCPG has a balance of \$ 8,913 grand total \$14,948.

Currently, there are 45 council members .

LEAVE A
LEGACY® During the Golden Wedding program approximately 650 brochures & combs will be distributed. Additionally, combs will be passed out at the Citizen Corp Council booth.

A three member gift planning panel will present "Advanced Directives" at the Pitzer Center on Aug. 25, 2005. Several sessions are planned.

Program “Charitable Buckets” presented by Ron Philgreen, CLU, CHFC

Plan for the distribution of YOUR assets!

“Convert Tax Dollars to Charitable Giving Dollars”

Philgreen reviewed four “Charitable Buckets” Alternatives to the Outright Sale of Appreciated Assets. Case 1. Sell it Outright & Bite the Bullet Strategy. Case 2. 100% Asset Rollover Strategy”. Case 3. “Split Sale” & Asset Rollover Strategy. Case 4. The “Double Rollover” Strategy.

A handout, “Philanthropic Estate Planning” was provided each attendee to follow the individual strategies. Copies can be obtained by e-mailing Ron at www.charitablebuckets.com

Fact: People spend more time watching TV in one day than the time they spend on their estate planning.

“In a few hours of estate planning, many clients could save more than they accumulated over the last several years.”

- Price Waterhouse

Meeting Adjourned