

SCNCPG  
Minutes  
November 18, 2005

Present: Bartlett, Beyeler, Butler, Duncan, Fuhrman, Green, Hershberger, Hoskins, Marrinan, Matthies, Naulty, Moormann, Pickarski, Roberts, Schwartz, Swaney, Timmons, Webb, Martin, Evans, Hickman, McGarry, Demaree, Elder, Vander Roest, Halister

Motion: Approve three minutes of September 23, 2005.  
Butler / Schwartz passed unanimously

NCPG  
dues National is raising their dues to \$150.00 annually, \$10 increase.  
SCNCPG dues will remain \$50 annually.

D.C.  
Update Tax Relief Act of 2005 approved including the IRA charitable rollover.  
  
Tax Reform Panel improves Benefits for Charitable Giving, allows tax-free distributions from IRA's made directly to a qualified charity.  
  
KETRA is now law. Cash gifts are deductible up to 100% of AGI whether or not the gift is related to Katrina relief (any charity acceptable)

Seminar  
Review 44 individuals attended the LHD seminar. Positive feedback received on the event. Most popular session, "hands-on" application, two discussion groups in the same room was a negative. Program net (\$45.91)  
  
Several professionals commented that a full day seminar was too costly in terms of time away from the office, should consider half day event.

2006  
Programs Marrinan and company held a program planning session and developed a Calendar for 2006. January's topics will be "Giving Away the Farm" presented by Ron Timmons.

Treasurers  
Report SCNCPG has 36 paid-up members.  
Treasury has a balance of \$ 9062.40 (incl. LAL \$909.09)

LEAVE A  
LEGACY

Approximately 30K tabloids were distributed in the News / Sun on September 23. Extra copies are being provided to tax prepares and distributed at professional offices and the library.

2006 National License & Sponsor Agreements have been made available by NCPG. Each of the four Sponsored LEAVE A LEGACY® programs must complete the applications and return to NCPG by 1.1.06.

Program

Tom O'Diam J.D., presented "Good For Business" He identified creative Opportunities of business charitable contributions. If the donor understands the available tax advantages, a contribution may be larger than one might expect. Look for opportunities, i.e. business owners nearing retirement, owners with unneeded real estate, or other assets.

Top Ten Tips for Advisors

1. Only explore charitable strategies with clients who are charitably motivated in the first place.
2. Gather through information about your client's personal and financial situation.
3. Listen intently to your client.
4. If you client doen not show an interest in charitable planning, at least address the subject with them.
5. If your client does show an interest in charitable planning, focus on the non-tax benefits of various strategies first.
6. Explain strategies in plain English.
7. Educate to motivate.
8. Carefully select only those charitable strategies that actually accomplish the client's goals.
9. Find an appropriate balance.
10. Get help by assembling a team of advisors for complex cases.

Meeting adjourned