

Three CLE hours approved!
Includes one hour of ethics!
CPAs earn 3.5 CPE credits!

Planned Giving & Ethics Seminar

For Attorneys, Accountants, Financial Advisors & Other Professional Advisors



Wednesday, October 17, 2012

8:00 a.m. - 11:45 a.m.

Maytag Auditorium at Iowa Public Television

Hosted by Orchard Place Foundation and the IPTV Foundation



Schedule of the Day

7:30 – 8:00 a.m.	Registration and Continental Breakfast
8:00 – 8:15 a.m.	Welcome and Opening Comments
8:15 – 9:15 a.m.	The Latest Developments in Charitable Gift Planning
9:15 – 9:30 a.m.	Break (Refreshments Provided)
9:30 – 10:30 a.m.	Ethical Issues in Gift Planning – The Sequel
10:30 – 10:45 a.m.	Break (Refreshments Provided)
10:45 – 11:45 a.m.	Charitable Planning Strategies with Tax-Heavy Assets
11:45 a.m.	Adjourn followed by a tour of IPTV Studios (Optional)

**The three one-hour sessions will be presented by
Johni Hays, an attorney and charitable gift planning expert.**



Seminar Fee

The fee to attend is \$25 per person. Please register today by returning the reply form (on next page) with payment (check or credit card) to:

Sandi Tuttle, CFRE
Orchard Place
925 SW Porter
Des Moines, IA 50315

(Check payable to Orchard Place.)



Seminar Location

Iowa Public Television
Maytag Auditorium
6450 Corporate Drive
Johnston, IA 50131

Please note location of seminar is different from where payment is mailed.

Questions? Contact Sandi Tuttle, CFRE at (515) 287-9648 or Rob Hilbert, CFRE at (515) 242-4135. We can also be reached via email at stuttle@orchardplace.org or rob.hilbert@iptv.org, respectively.

**Registration Deadline is October 8, 2012.
See next page for registration form!**



Our Presenter

Johni Hays, JD

With almost 20 years experience as a practicing attorney in charitable and estate planning, Johni Hays is a recognized expert on the subject of charitable gift planning.

Johni is the author of the book, *Essentials of Annuities* and co-author of the book, *The Tools and Techniques of Charitable Planning*. Johni serves on the Editorial Advisory Board for the books *Tax Facts on Investments* and *Tax Facts on Insurance and Employee Benefits*. She serves as a charitable planning author of Steve Leimberg's electronic newsletter service, LISI, found at www.leimbergservices.com.

Johni has been quoted in the Wall Street Journal and has published charitable planning articles in Estate Planning Magazine, Planned Giving Today, Fundraising Success, Life Insurance Selling and the National Underwriter magazines.

Johni is a national lecturer on estate and charitable planning, probate, living wills, annuities, life insurance, retirement planning and IRAs, as well as income, estate and gift taxation.

Johni has been engaged in the practice of law with an emphasis in charitable and estate planning since 1993. Johni graduated cum laude with a Juris Doctor degree from Drake University in 1993. Johni has been a member of both the Iowa Bar and the Florida Bar since 1993.

About Your Hosts



"Developing strong futures for children and youth with mental health and behavioral disorders."

Orchard Place, a premier provider of children's mental health and behavioral services, has served Iowa's children since 1886. Orchard Place works with many of the state's most emotionally troubled children, providing inpatient, outpatient and community-based services by highly skilled-child therapists and caseworkers in an effort to help children develop strong futures. In 2011, Orchard Place served 9,048 children and youth ages 0-22 through its Child Guidance Center, Orchard Place Campus, and PACE Juvenile Center.



"To educate, inform, enrich, and inspire Iowans."

Iowa Public Television is Iowa's statewide public broadcasting network. IPTV provides quality, noncommercial programming to make a difference in the lives of Iowans. IPTV is committed to telling Iowa's stories like no one else can. Our mission enables IPTV to present an unequalled array of programs of lasting value to Iowans regardless of where they live or what they can afford.

More than 2.2 million viewers a month turn to IPTV for programming that reflects a range of interests for Iowans in all demographic categories. IPTV offers three programming channels statewide: IPTV, IPTV LEARNS, and IPTV WORLD.

REGISTRATION FORM

October 17, 2012 Planned Giving & Ethics Seminar

Name _____

Organization _____

Street _____

City _____ State _____ Zip _____

Phone _____

Email _____

Please return form with your \$25 Seminar Fee, payable to Orchard Place, to:

Sandi Tuttle, CFRE
Orchard Place
925 SW Porter
Des Moines, IA 50315

Check _____ or Credit Card _____

CC#: _____ - _____ - _____ - _____

Exp: _____ / _____ Card Security Code (3 digits): _____

(On back of card.)

REGISTRATION DEADLINE IS OCTOBER 8!

(For additional registrants, please copy form.)