

8:30 a.m. Coffee & Conversation

9:00 a.m. Welcome/Introductions and Announcements

9:30 a.m. Presentation by Chuck Nelson

Chuck Nelson, Chief Development Office for Menno Haven, Inc. will discuss new and interesting planned giving vehicles, such as giving from refundable entrance fees.

10:30 a.m. Break

10:45 a.m. Rapid Fire Round

We will introduce a subject and then go around the room to hear the thoughts, ideas, and experiences regarding each topic. Remarks should be kept short and to the point. You may pass at any time. We will continue until member responses end.

Today's Topics:

1. Amy Cummings-Leight: *Has anyone accepted car donations for their organization themselves (to be used by housekeeping or other on campus staff). Do they require IRS tax forms 1098C and 8283 and PA MV-13ST or does the finance department help with this? Donors get a possible better deduction if the organization can use it in their operation. Or do you use any third party car donation program like <https://careasy.org/partners/signup?>*
2. Amy Cummings-Leight: *Do people only include in any Legacy Society they have people who you know have named your organization in their will, made you a full or partial beneficiary of their retirement account, life insurance or have another planned gift to benefit the organization like a charitable gift annuity, etc.? Does anyone count major donors over a certain level in their legacy society who you don't know that they have include your organization in their estate plan?*
3. Michele Dombach: *What are your organizations criteria for accepting a gift of a life insurance policy of a living donor?*
4. *Questions from the floor*

12:00 p.m. Lunch

Mark Your Calendar – dates for 2022!

August 5, 2022 - Christ Home (Christ's Home Community Center)

November 4, 2022 – The Hill at Whitemarsh

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