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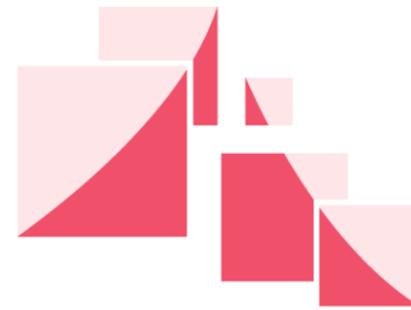


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## Mid-America Charitable Gift Planners

### CONTACT

816.289.0099

INFO@MIDAMERICACGP.ORG

MIDAMERICACGP.ORG

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## MACGP ANNUAL REPORT

What an amazing year we have had, and all because of the hard work and dedication of this chapter! Thank you for coming to the meetings, and a special thank you to the committee members. This year we hit new highs for number of members and for average attendance. We strive to be your local source for Gift Planning information by providing high quality education, unique networking opportunities and professional development. In 2018, we changed our name to be more all-inclusive of our mission and what we stand for. We are a proud member of the National Association of Charitable Gift Planners (CGP) and were privileged to be the 2018 Council of the Year. As it has been in the past, CGP remains dedicated to its essential core value: To support the professionals who practice the art and science of charitable gift planning.

We are looking forward to providing more quality programming next year, including the 2020 Building Blocks Conference, where Dr. Russell James will be returning to update us on his latest research!

Thank you again to everyone who is a part of MACGP. It has been my honor and privilege to serve as your president!

*-Bill Riek, president*

## WONDERFUL PROGRAMMING

### MONTHLY BREAKFAST MEETINGS

TYPICALLY THE SECOND FRIDAY OF EACH MONTH AT THE KAUFFMAN FOUNDATION

- Charitable Gift Planning
- Financial Advising Topics
- CLE and CFRE Credits on occasion
- Networking and Collaborating
- Marketing Strategies
- Retirement Assets
- National Experts
- And much, much more!

## OUR MEMBERS

Our growing membership consists of development professionals from charitable organizations, financial planners, estate planning attorneys, accountants, trust officers and other professionals who regularly practice in the charitable gift planning field.

OUR COMMITTEES HAVE BEEN HARD AT WORK IN 2019 AND HERE IS A BRIEF REPORT OF ALL THAT WE HAVE ACCOMPLISHED. PLEASE REACH OUT IF YOU WOULD LIKE TO BE A PART OF ONE OF THESE GROUPS.



**Advocacy - Cole Eason**

Throughout the year, we have been watching the impact of the recent tax changes on charitable giving, and have engaged with The National Association of Charitable Gift Planners (CGP) to advocate for our members and promote the value of the charitable giving profession to policymakers. We are presently monitoring the progress of two bipartisan bills introduced in the spring of 2019. The SECURE (Setting Every Community Up for Retirement Enhancement) Act was introduced in the house and, shortly after this, the Senate introduced a companion bipartisan bill, RESA (the Retirement Enhancement and Savings Act). These proposals cover many retirement issues, but the most far-reaching is a modification of the 'Stretch' IRA rules. Our goal is to encourage a positive legislative and regulatory environment for charitable giving.

**Building Blocks - Stacey Million**

In 2019, our speakers' dinner was held at a former MACGP president's home in Brookside and everyone raved about the KC BBQ, hospitality and comfortable venue. Due to our overall success and collaboration with other committees, we were able to have two nationally known keynote speakers and, in keeping with our mission, we were able to keep the price of attendance down so that smaller nonprofits would be able to benefit from this high quality local program.

**Communications & Marketing - JT Cattle**

We joined the world of Facebook and are actively promoting on LinkedIn; like us and follow us online and share the news with your respective networks! Through continued outreach in our newsletters and online updates, we serve our members and keep everyone informed of upcoming meetings and important updates. We promote events, design invitations and work with all the committees to ensure streamlined efforts among the organization. A huge thanks to the committee, and a special thanks to Cheryl for all her design work and attention to detail.

**Hospitality & Welcoming - Kristin Shore**

This committee serves as greeters at each meeting, arriving early to welcome all in attendance. In addition, we welcome all new members by reaching out via phone or email once a member has joined. New in 2019 are automated welcome emails. These are generated for all new members once they have joined.

**MACGP & AFP Partnership - John K. Goodwin**

In 2019, for the first time, MACGP teamed up with the Mid-America Chapter of the Association of Fundraising Professionals to present the Legacy Giving Partnership award to Mr. William Gann. AFP's National Philanthropy Day was a huge success, with its largest attendance to date. We look forward to the continuing evolution of the partnership and collaboration between MACGP and AFP.

**Membership - Bill Eckert**

Membership is the lifeblood of an organization. We're blessed to live in a city where generosity defines us as Kansas Citians. MACGP experienced double-digit growth in membership for the last several years thanks to the hard work of the Membership Committee. Our organization ended 2019 with more than 140 members. We introduce our guests at every event and follow up with a warm personal phone call to thank them for attending. Meaningful engagement and delivering on the investment that each member makes when they join is leading to steady growth.

**Program - Bill Riek**

We hosted nine breakfast program events, two summer socials and a holiday event at KC Repertory Theatre. The well-attended summer socials included a reception and tour of Grace United Community Ministries in NE KC in June and a July reception at Lathrop Gage including our friends from these organizations: AFP, APRA and GPA. Among the topics of our breakfast meetings were Donor Advised Funds and Working with Clients with Diminished Capacity. We are pleased that the 2020 calendar is already set through August, with a June social at City Union Mission and July social at Country Club Bank on the Plaza.

**Scholarship - John Martin**

We offer three scholarship opportunities to those in development, planned giving, or in allied professions who lack financial resources or are new to the profession. The Committee offers an annual scholarship to MACGP breakfast meetings (\$150 value); another scholarship for free attendance to the annual Building Blocks conference (\$100); and one scholarship for attending the National Conference in the fall (\$2,000), including reimbursement of trip expenses.

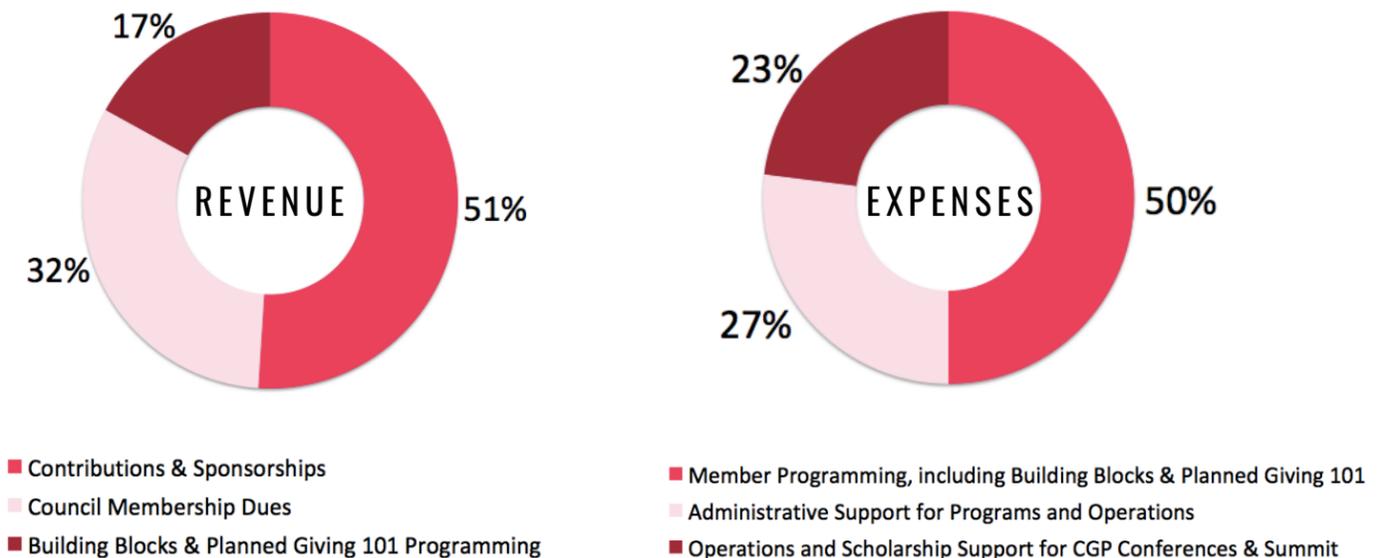
**Sponsorship - Pat Smithson**

Our committee worked to develop some new marketing collateral and giving levels for the chapter. We included levels for Building Blocks sponsorships which helped to generate new revenue. We ended up with 14 Bronze sponsorships, 8 Silver Sponsors, 4 Gold Sponsor, 8 Platinum, 2 Diamond Sponsors and a Presenting Sponsor. We had Building Blocks; Breakfast and lunch sponsors, Speaker Dinner Sponsor and a breakout sponsor. Great year generating record setting revenue which is another banner year thanks to our sponsors. Funding allowed us to bring in some great speakers, offer scholarships, ability to offer Building Blocks at a great rate to all and help to fund our Administrator who makes it all happen. Thanks to Cheryl Hanback for all her hard work.

**Treasurer - Cynthia A. Randazzo, CFRE**

MACGP has had a strong financial year with record number of contributions and sponsorships raised at \$26,400 in 2019. Total revenue also reached record highs with \$54,531 in total revenue, which is a 15% increase over 2018, which experienced a net loss of (\$3,896). This significant level of support from our MACGP membership is allowing us to reinvest in more programming and scholarships in 2020 with the addition of a "Planned Giving 101" conference.

**MID-AMERICA CHARITABLE GIFT PLANNERS BUDGET**



**SAVE THE DATE**

**PLANNED GIVING 101**  
**THURSDAY, APRIL 30, 2020**  
 A 1/2 DAY MORNING CONFERENCE  
 TO LEARN THE BASICS

**25TH ANNUAL BUILDING BLOCKS**  
**FRIDAY, SEPTEMBER 18, 2020**  
 FEATURING KEYNOTE DR. RUSSELL JAMES  
 AND MUCH MORE

