NEBRASKA UNITED METHODIST FOUNDATION PRESENTS:

Put Your House in Order

Kearney First UMC
4500 Linden Drive, Kearney, NE 68847
Friday, October 11, 2024

Time	Session	
8:30 – 9:00 AM	Check In	
9:00 – 9:25 AM	Welcome & NUMF Basics	
9:30 – 10:00 AM	Nebraska Transfer of Wealth: Elizabeth Troyer-Miller	
10:00 – 11:45 AM	Breakout Sessions & Execute Documents	
10:00 – 10:25 AM	Clergy: Membership & Community Engagement Brandon Sak	Laity: Retirement Plans – Tax Advantages Bruce Lear
10:30 – 10:55 AM	Laity: Estate Planning 101 Leslie Gibbens	Clergy: Legacy Society Basics and Benefits Kristine Roberts
11:00 – Noon	Keynote: Randall Hallett, Hallett Philanthropy	
Noon – 12:30 PM	Lunch and Fellowship	
12:30 – 2:00 PM	Breakout Sessions & Execute Documents	
12:30 – 1:00 PM	Inspiring Generosity in Church & Community Judi Sickler	Keynote Debrief Randall Hallett
1:05 – 1:55 PM	Top 5 Lessons Learned: Debi Nixon	
2:00 PM	Closing, Thank You, Q&A	

Speaker Bios

Randall Hallett
Randall is the CEO and Founder of Hallett Philanthropy, a full-service consulting firm. Having spent his entire career in philanthropy, Randall has a passion for helping organizations seek funding to meet their mission, and believes giving is good for one's emotional and physical well-being. He has worked with universities, healthcare systems, hospitals, medical centers, community non-profits and more, here in the US and across the globe. Before consulting, he was the Chief Development Officer and Senior Executive at the Nebraska Medical Center where his team supported the $370 million 18-month fundraising effort for the Fred and Pamela Buffet Cancer Center. Educationally, Randall has received his bachelors, master's in business administration, juris doctorate (law degree), and his educational doctorate in leadership and public policy. His latest book Vibrant Vulnerability: Mastering Philanthropy for Today and Tomorrow's CEO delves into the relationship between fundraising and non-fundraising CEO's.

Elizabeth Troyer-Miller
Elizabeth works from her hometown of Wood River, supporting communities with affiliated funds in central Nebraska through the Nebraska Community Foundation (NCF). She brings a passion to work with others to bring big goals into reality in her role as Affiliated Fund Development Coordinator. Elizabeth hails from Happy Valley in central Pennsylvania and is a transplant to the Nebraska plains. She has her B.A. in Peace, Justice and Conflict Studies from Goshen College (IN) and her M.S. in Negotiation and Dispute Resolution from Creighton University. Prior to joining NCF, she worked for the Heartland United Way and before that, spent 10 years mediating and facilitating with The Resolution Center and Central Mediation Center. Her life outside of work is spent investing in her own community of Wood River through a variety of projects ranging from early childcare and education to housing, and when the season comes, you can find her in the garden. Together with her husband, she chases after their three children.

Brandon Sak
Brandon serves as principal consultant at Hallett Philanthropy, proudly serving the people and missions of non-profit organizations. He brings more than a decade of hands-on experience in fundraising, leadership and team building. He is driven by helping clients meet goals, forge relationships, and fuel the good work of non-profits and their missions.

Bruce Lear
Bruce is the Senior Vice President and heads up the Investment Division for Five Points Financial Services. Bruce started at Dean Witter Reynolds, Inc. in 1994 and spent more than 15 years managing trusts for two Nebraska-based bank trust departments prior to becoming an independent financial advisor and joining Five Points in 2019. Bruce is married with two grown children, serves on the Kearney City Council and coaches soccer in his spare time.

Leslie Gibbens
Leslie Gibbens is a Vice President and Trust Services Advisor in Union Bank & Trusts Wealth Management Division. A Certified Trust Fiduciary Advisor, she has her Certified Corporate Trust Specialist designation and has successfully completed the Certified Public Accountancy examination. Leslie has been with Union Bank for 24 years, and she serves on many boards and enjoys giving back to the community. Her passion is for both children and seniors. She has three grown children and two active dogs that keep her busy in her spare time.

Judi Sickler

Judi Sickler is the President/CEO of the Kearney Area Community Foundation. She is also an active member at Kearney First United Methodist Church. She is a native of Kansas, but has lived in Kearney since 1989. Judi has extensive training and experience working with grants, special events, fundraising, planned gifts, endowments and donor relations since joining the Foundation, not to mention the wide variety of life experience through volunteerism. This year she is president of a local P.E.O. chapter, a founding board member of the Kearney Community Sustainable Housing nonprofit organization, active member (and a past president) of the Kearney Noon Rotary Club and a current Trustee and Secretary of the First United Methodist Church in Kearney.

Debi Nixon

Debi Nixon is the Executive Director of Donor Relations and the Resurrection Foundation at the United Methodist Church of the Resurrection. Serving first as a volunteer, she joined the staff in 1994 as the founding children's ministry director. Over time she has served in a number of roles from launching small groups to launching new locations. She has been responsible for the coordination of Resurrection's Capital Campaigns, and since 2019, the generosity and stewardship initiatives of the church. Helping individuals discover the joy of being a part of God's kingdom work is her driving passion. Debi was responsible for Resurrections ShareChurch Ministry, a ministry to equip local church leaders for 20+ years and has led workshops nationally and internationally on church leadership with a focus on radical hospitality, church renewal, and raising up new leaders. She and Reed have been married since 1984 and together they treasure every moment with their two grown children, but if you really want to see her light up, ask about her grandchildren!

Attorneys include:

Damon (Dan) Bahensky

Dan has been a partner in the law firm of Parker, Grossart & Bahensky, LLP since 1980. His areas of practice include estate planning, probate, and real estate law. He was admitted to the Nebraska Bar in 1977 and attended the University of Nebraska College of Law and undergrad at UNL where he majored in Business.

Jack Besse

Jack is a partner in the law firm of Parker, Grossart & Bahensky, LLP and has a diversified legal practice. He represents clients in various civil litigation, estate planning, probate, business and real estate matters. Prior to joining the firm in 2020, Jack was a shareholder at the law firm of Fangmeyer, Aschwege & Besse, P.C. Jack graduated from Kearney State College in 1986 and received his law degree from the University of Puget Sound in 1989. He is a member of the Buffalo County Bar Association and the Nebraska State Bar Association. Jack enjoys volunteering in his community, including on the Kearney Public Schools Foundation Board, Kearney Trolleys, Kearney Chapter of the American Cancer Society, and the Fort Kearney Shrine Club, to name a few.

Session Details

** We have tried to gear certain sessions towards either clergy or an individual congregation member, but some topics may interest you more than others. You are free to attend any session.*

Nebraska Transfer of Wealth
There is always a transfer from generation to generation, as parents pass away and leave their estates to their children. But if the heirs no longer live where they grew up, those critical resources leave as well. Many Nebraska counties are approaching or are already in the midst of their peak transfer years. The Nebraska Community Foundation's Transfer of Wealth Study illustrates the real urgency to act now.

Clergy: Membership and Community Engagement

Laity: Retirement Plans – Tax Advantages
This session will educate individuals on tax planning and the nuances of charitable giving.

Laity: Estate Planning 101
Leslie will speak on the importance of a good estate plan and what makes up a good plan. She calls this Estate Planning 101.

Clergy: Legacy Society Basics and Benefits
Non-profits are focusing more and more every year on the need and benefits of creating a Legacy Society. This session will help you understand the benefits and give you the basic steps to begin a Legacy Society at your church or ministry.

Keynote: While the "mission" for any church/congregation/religious group is centered on a higher authority, the mortal world requires us to acknowledge "no money, no mission." And thus, understanding the trends of today's philanthropy is critical to ensuring a strong mission. During the keynote conversation, the current data regarding philanthropy will be shared including the reduction in households making charitable gifts (particularly in religion), the importance of having an aspirational vision beyond obligations to meet "donors" expectations, and the power that philanthropy has on the health and mentality of those that choose to be charitable.

Inspiring Generosity in Church & Community
Come listen and be inspired to be a generous giver to your church and community as we discuss the importance of charity in Christian life. Judi is an active member of Kearney First United Methodist Church and her community and happens to be the President/CEO of the Kearney Area Community Foundation. This will be light and not "preachy." Let's talk about transitioning from Transactional to Transformational charity.

Keynote Debrief
Enjoy conversation with Randall Hallett following his keynote presentation. This is a more intimate setting to have a thought-provoking discussion.

Top 5 Lessons Learned
Debi is the co-author of *The Art of Hospitality* and the author of CATCH*: A Churchwide Evangelism Program* by Abingdon Press. As we close our time together, Debi will share five keys she has learned these past five years of doing fulltime development ministry, keys that have made all the difference in cultivating a culture of generosity.

Put Your House in Order: Appointments

Congratulations! You have decided to take advantage of the crucial step of executing your documents on October 11, 2024 at the NUMF event at Kearney First UMC. Here are the details that you need to know before you arrive on that Friday:

1. The estate documents included with our event includes: a simple Last Will and Testament, Health Care Power of Attorney, and Contingent Durable Power of Attorney.

2. You must fill out and return the attached form by September 27, 2024 in order to execute your documents on October 11, 2024. This gives the attorney who you are scheduled to meet with time to prepare your documents and ask you any follow-up questions before the event day.

3. The attorneys who are helping NUMF with this event are providing their estate planning services for a discounted rate on this day. Please bring payment with you in the amount of $150 (for one person) or $200 (for a couple) on October 11, 2024. If you prefer to write a check in that amount, you will receive an email in advance of October 11, 2024 to let you know who you are meeting with and to whom to make the check payable.

4. Please make sure to bring a form of ID so that your documents can be properly notarized.

5. If you would simply like to ask any of our attorneys' legal questions without executing your documents, please RSVP and clarify that you are interested in a codicil when NUMF reaches out to you to schedule.

6. If you already have a will and powers of attorney, you may do a simple codicil if you want to make one or two small changes. Again, please let us know if you would like to do this and we can email you separately what the fee would be.

7. This event is hosted by Nebraska United Methodist Foundation. We encourage you to use the Foundation to remember your home church and/or favorite ministry in your estate planning. Here is some sample language that you can use:

"I give and bequeath to the Nebraska United Methodist Foundation, a not-for-profit corporation, located in Lincoln, Nebraska at 100 W. Fletcher Ave., Suite 100, Lincoln, NE 68521, 10% of my gross estate, for the benefit of ___________ [church, camp, ministry, NUMF]."

"I give and bequeath to the Nebraska United Methodist Foundation, a not-for-profit corporation, located in Lincoln, Nebraska at 100 W. Fletcher Ave., Suite 100, Lincoln, NE 68521, the sum of $___________ to be used for the benefit of ___________ [church, camp, ministry, NUMF]."

"All the rest, residue, and remainder of my estate, both real and personal, I give, devise, and bequeath to the Nebraska United Methodist Foundation, to be used by its Board of Directors as deemed advisable within its corporate powers for the benefit of _______________."

*Please note that this event is for execution of simple wills and powers of attorneys. If you would like to do something more, please let us know.

Your Information:

Name:____

Home Address: ____ Phone: __________________

City:___________________________________ State:_______________ Zip Code: ________________

Email Address: ____

Executor Information:

Personal Representative: ____

Secondary Personal Representative: ____

Division of Property:

If you are married, your estate automatically goes to your spouse if something happens to you.

If something happens to both you and your spouse:
Estate equally divided between: ____

Or Estate given to: ____

____

*Specifically, do not leave anything to: ____

Personal/sentimental value items can be left to specific people in a Special Bequest Letter provided for in your wills.

****If no one survives me, then my estate goes to:** ____

____

(Example: Charity, Church, etc.) ***Consider this language***: **"I hereby give, devise and bequeath 10% of my entire estate to the Nebraska United Methodist Foundation, a non-profit organization located at 100 W. Fletcher Avenue, Suite 100, Lincoln, NE 68521, Federal Tax ID 47-0844886, for Nebraska United Methodist Foundation's general use and purposes and/or for the benefit of [your church UMC]."**

Health Care Power of Attorney (health care decisions)

Agent to make Health Care Decisions: ____

Address: ____

Phone number: ____

Secondary Agent: ____

Address: ____

Phone number: ____

Contingent Durable Power of Attorney (financial decisions)

Agent to make Financial Decisions: ____

Address: ____

Phone number: ____

Secondary Agent: ____

Address: ____

Phone number: ____