**NEBRASKA UNITED METHODIST FOUNDATION PRESENTS:**

**Put Your House in Order**

 Horizons Community Church

3200 Grainger Pkwy, Lincoln, NE 68516

Friday, September 12, 2025

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| **Time** | **Session** |
| 8:30 – 8:45 AM | Check In |
| 8:50 – 8:55 AM | Welcome |
| 9:00 – 9:45 AM | Asking for Planned GiftsAdam Hamilton |
| 9:50 – 10:40 AM | Keynote: Increasing Charitable Giving & Passion-Related Solicitations Randall Hallett, Hallett Philanthropy |
| 10:45 – 11:15 AM | Neb. Transfer of WealthTodd Mekelburg |
| 11:15 – 11:45 AM | Finding Efficiency through Charitable GivingBrian Thomas |
| 11:45 – 12:15 PM | Lunch & NUMF Basics |
| 12:30 – 1:00 PM | Put Your House in Order & Give a Great Gift!Chuck Rager |
| 1:10 – 1:40 PM | Estate PlanningJohn Cartier & Matt McKeever |
| 1:45 – 2:15 PM | A Spectrum of LegaciesSharon Schmidt |
| 2:20 – 2:30 PM | Closing, Thank You, Q&A |

**Session Details**

Asking for Planned Gifts and Other Stewardship Insights

Adam will share how he invites people to remember Resurrection in their estate plan, why it matters, and how he and LaVon think about their own personal giving.

Increasing Charitable Giving & Passion-Related Solicitations

Randall is incredibly kind to continue to speak to our group at each of our Put Your House in Order events. He will continue this year in educating attendees to increase charitable giving by lessening the obligatory requests for donors. He will also give some insight on how to increase passion-related solicitations. This session will incorporate endowments, understanding and increasing capacity of donors, creating a stronger community, getting to transformational gifts, and dealing with obstacles along the way.

Nebraska Transfer of Wealth

Since their first study in 2002, Nebraska Community Foundation has been on the leading edge of understanding the intergenerational transfer of wealth. What does this look like in Nebraska? How can you plan to help non-profits thrive in your area or community? A financially healthy community only bolsters prospects for a growing church community. The two can work together to create a stronger community.

NUMF Basics

Learn what the Nebraska United Methodist Foundation offers in services and resources.

Finding Efficiency through Charitable Giving

Brian has experience in the ministry and as a financial advisor. Armed with these skills, Brian will share some tips on thinking outside the box in your charitable giving. He has strategies to help the charity and individuals, including using life insurance to fund charitable giving.

Put Your House in Order AND Give Your Loved Ones a Great Gift!

Chuck’s wife, Roberta died unexpectedly and suddenly in August of 2024. Based on his own personal experience and experiences throughout many years in ministry and helping many, many people navigate the waters after the loss of a loved one, Chuck will share his insight of a great gift idea that people can give their loved ones.

Estate Planning

John and Matt will focus on the benefits of having an estate plan, planned giving from the legal perspective and the benefits of giving to the Foundation on behalf of your church.

A Spectrum of Legacies

Mark A. Weber wrote an amazing book that Sharon will summarize and highlight to help with your planned giving efforts in your local church.

**Speaker Bios**

**Adam Hamilton**

Adam is the founding pastor of the Church of the Resurrection, the nation’s largest UMC. He grew up in Kansas, has been married to his high school sweetheart for 43 years, has two adult children and a granddaughter he is crazy about. He has written numerous books, including the best-selling *Enough: Discovering Joy Through Simplicity and Generosity*.

**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 bachelor’s and 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.

**Todd Mekelburg**

Todd is Nebraska Community Foundation’s Director of Gift Planning and lives in Lincoln. Prior to joining NCF, Todd served as Director of Planned Giving at Loma Linda University Health in southern California where he helped families realize their charitable gift planning goals. Todd grew up in Yuma, Colorado, but he has a long connection with Nebraska. His great grandparents met and married at Union College in 1893, then farmed in the Lincoln and Amherst communities before eventually settling in northeast Colorado. He attended high school near Shelton, Nebraska and then completed a degree in business administration and accounting at Union College in Lincoln.

**Sharon Schmidt**

Sharon joined the Nebraska United Methodist Foundation in June 2024 and oversees gift planning. Focusing on the highest ethical standards Sharon equips individuals, churches, and related agencies in the development of planned gift programs, investment programs, and endowment funds throughout the Great Plains United Methodist Conference.

**Brian Thomas**

Brian joined Clarity Financial in 2019. Committed to act in his clients' best interest, Brian brings the same dedication to financial planning that he brought to nearly 20 years of Christian ministry. His comprehensive approach is motivated by a deep interest in the wellbeing of his clients. Brian believes financial planning should be accessible for everyone - regardless of their net worth. On weekends, Brian serves on staff as the worship leader Horizons Community Church in Lincoln. He loves to sing, play his guitar, and write music to share with others.

**Chuck Rager**

Chuck is ordained United Methodist Clergy. He most recently served Gretna UMC and Ogallala First UMC where he was instrumental in promoting and growing their endowment funds. His wife, Roberta died unexpectedly and suddenly in August of 2024. Based on his own personal experience and experiences throughout many years in ministry and helping many, many people navigate the waters after the loss of a loved one, Chuck will share his insight of a great gift idea that people can give their loved ones.

**John Cartier**

John is a seasoned attorney with a diverse background in civil matters, government relations, and election law. He has provided legal services through Cartier Law, LLC, in Lincoln where he represented clients in discrimination claims and advised nonprofits on employment and compliance matters.  Presently, John is the Attorney General for the Omaha Tribe of Nebraska and a Partner with Omnus Law. John holds a J.D. from the University of Nebraska-Lincoln.

**Matthew McKeever**

Matt is a partner in Burnett Legal Group, LLP with offices in West Omaha and Gretna.  He has over 28 years of experience in estates, trusts and business planning.  He is also a trial attorney for various civil and commercial cases including the areas of business litigation, insolvent estates, trust disputes and probate litigation. Since 2013, he has been representing clients in the emerging areas of Bitcoin and blockchain technology, including the regulation of digital currencies, compliance issues, government relations and estate planning.  Matt is licensed to practice law in Nebraska and New York.  Matt enjoys spending time with his family. You’ll sometimes find him hunting, watching Husker football or following Yankees baseball. He values the importance of community involvement, and he has taken leadership roles in his church and groups such as the Omaha West Rotary Club.  He is a member of Elkhorn Hills United Methodist Church in Elkhorn.  In the past he helped to mold the litigators of the future by coaching high school mock trial teams. He’s also always ready for a good game of cribbage.

**Put Your House in Order: Appointments**

Congratulations! You have decided to take advantage of the crucial step of executing your documents on September 12, 2025 at our Annual NUMF event, located at Horizons Community Church in Lincoln. 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 ***August 22, 2025*** in order to execute your documents on September 12, 2025. 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 $300 (for one person) or $400 (for a couple) on September 12, 2025. If you prefer to write a check in that amount, you will receive an email in advance of September 12, 2025 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 consultation 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 are some sample phrases 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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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\*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:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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(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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Contingent Durable Power of Attorney (financial decisions)**

Agent to make Financial Decisions: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Secondary Agent: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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