

QUAD CITY PLANNED GIVING COUNCIL

We're excited to invite you to become a member of the Quad City Planned Giving Council for another year!

The Quad City Planned Giving Council is all about making planned charitable giving better in our region. We're the go-to resource for the Quad Cities' gift planning community, working together to boost philanthropy for the greater good. We do this by providing education and encouraging collaboration to improve charitable gift planning and make our community better through the generous gifts from our donors and clients.

In previous years, our members benefitted from networking and expert guest speakers including nationally renowned speakers Professor Sam Donaldson from Georgia State University, Marty Shenkman from Shenkman Law, Professor Christopher Hoyt of University of Missouri-Kansas City School of Law, and local experts Jennifer Nohelty from PragerU, Johni Hays from Thompson & Associates, Hap Volz from the Quad Cities Community Foundation, Marcia Ericson from ActionCoach Business Coaching, and David Nelson from Nelson Corp Wealth Management.

We'd love for you to join us for this upcoming membership year. This year, we're offering special, lower membership rates. Membership dues are just \$50 for professional advisors and just \$35 for nonprofit professionals. As a member, you'll enjoy some great benefits, including:

- Free access to learning events, with meals included at our in-person events, and Continuing Legal Education (CLE) credits when available.
- Opportunities to network and get mentoring from experienced professionals in our community.
- Monthly round table discussion lunches held on the first Tuesday of each month.
- Free on-site consultation, access to planned giving resources, and help with board presentations for nonprofit organizations.
- Resources from the National Association of Charitable Gift Planners to help you excel in planned giving.

You'll find our membership form enclosed with this letter. Just fill it out and send it along with your payment, made out to "Quad City Planned Giving Council," to Trista Foster at American Bank & Trust, 4301 E. 53rd Street, Davenport, IA 52807.

We'll keep you in the loop about our upcoming program events through email. We're always thankful for your dedication to encouraging planned charitable gifts for your clients, nonprofits, and our shared community. Please feel free to reach out to any Board Member listed below if you have any questions or need more information. We're here to help you make the most of your membership.

Thank you for considering our invitation. We're looking forward to welcoming you as a member of the Quad City Planned Giving Council, and together, we'll keep making a positive impact on our community through planned giving.

Rich Garrett, President
Salvation Army
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Paul Plagenz, Secretary
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Hap Volz
Quad Cities Community Foundation
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Colleen Rafferty
Trinity Health Foundation
Colleen.Rafferty@unitypoint.org



Membership Application

Membership runs from January to December of each calendar year.

- ☐ Yes, count me in as a QCPGC Professional Advisor Member.
Dues enclosed: \$50 (*check made payable to "Quad City Planned Giving Council"*)
- ☐ Yes, count me as a QCPGC Nonprofit Professional Member.
Dues enclosed: \$35 (*check made payable to "Quad City Planned Giving Council"*)
- ☐ No, I'm not able to be a member this year. Please keep me on the mailing list and send me information on programs and offerings.
- ☐ No, please remove me from the mailing list.

To help us keep you informed, please complete the following information:

Professional Name _____

Credentials (e.g.: CFP, CFRE, J.D., etc.) _____

Title _____

Organization _____

Work Address _____

City, State, Zip _____

Email _____

Work Phone _____ Cell Phone _____

Please return this completed form, and dues check, made payable to "Quad City Planned Giving Council," to:

Trista L. Foster, J.D., AAMS®
American Bank & Trust
4301 E. 53rd Street
Davenport, IA 52807