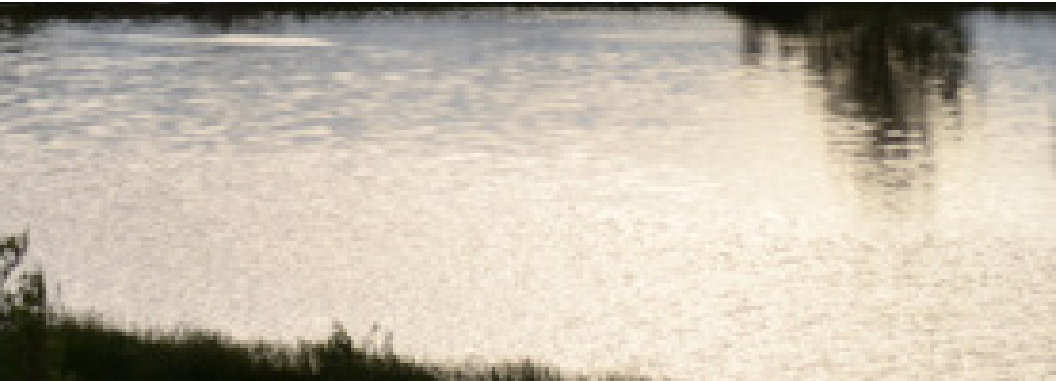




# PIKES PEAK COMMUNITY FOUNDATION SYMPOSIUM ON PHILANTHROPY

February 9, 2016

Garden of the Gods Club



# 2016 SYMPOSIUM ON PHILANTHROPY - SPONSORS



## *Many thanks to our committee volunteers:*

**Michael Deen** Kraemer, Kendall, Benson, Rupp & Deen, LLC

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**Jeff Jensen** The Jensen Group @ MorganStanley

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**Mari Sinton Martinez** Civic Leader

**Cynthia Nimerichter** Community Advocate

**Paula Pollet** Ent Wealth Management

**Rob Wrubel** Cascade Investment Group, Inc.

# SCHEDULE OF EVENTS

7:30 A.M. - REGISTRATION BEGINS

*Grandview Room*

8:00 A.M. - BREAKFAST

**John Suthers, Mayor of Colorado Springs**

*Keynote: Colorado Springs is on the Move!*

**Dr. Tatiana Bailey**

*Improving Trends in Colorado Springs*

9:40 A.M. - SESSIONS (SELECT ONE)

**Garden North**

**Frank Mullins**

*Multigenerational Philanthropy : An  
Antidote to Affluenza*

**Garden South**

**Nick Kittle**

*Government and Philanthropy: Connecting Our  
Communities*

10:40 A.M. - BREAK

10:50 A.M. - SESSIONS (SELECT ONE)

**Garden North**

**Jeanne McMains**

*Charitable Overlays for Advanced Family  
Estate Planning Strategies*

**Garden South**

**Tony Macklin**

*Is Your Family's Philanthropy Ready for the  
Future?*

*Grandview Room*

11:55 A.M. - LUNCH PLENARY

**Dr. Bob Seaberg**

*Philanthropy in 2016: Challenges and Opportunities*

## **John Suthers - Mayor of Colorado Springs**



### ***Keynote Address - Colorado Springs is on the Move!***

John Suthers has served as the mayor of Colorado Springs since May of 2015. Suthers brings decades of experience in government and management to the city of Colorado Springs. Before being elected Mayor, Suthers served as Attorney General of Colorado from 2005 to 2015. Prior to being Attorney General, he was named by President George W. Bush in 2001 to be United States Attorney for Colorado and he was unanimously confirmed by the US Senate.

In 1999, Suthers was appointed by Governor Bill Owens as Executive Director of the Colorado Department of Corrections, based in Colorado Springs. In 1988, he was elected District Attorney of the 4th Judicial District, which includes El Paso and Teller Counties. A lifelong resident of Colorado Springs, Suthers attended grade school here and graduated from St. Mary's High School. He graduated magna cum laude from the University of Notre Dame, and in the top quarter of his law school class at the University of Colorado.

## **Tatiana Bailey, Ph.D. - Director, Southern Colorado Economic Forum**



### ***Keynote Addendum - Improving Trends in Colorado Springs***

Tatiana Bailey has her Master's in economics and her doctorate in public health, both from the University of Michigan. Since obtaining her doctorate, she has taught micro and macroeconomics as well as health economics and policy at the University of Michigan and Walsh College. She is now also teaching a health policy class to MBA students at the University of Colorado.

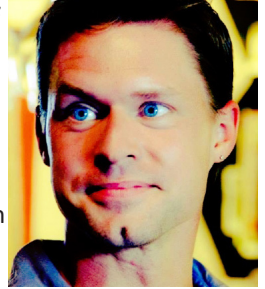
Dr. Bailey currently works in the health care and economic development fields. In the health care arena, she has focused on programs that aim to increase access and quality while reducing costs particularly for at-risk populations. In the economic development field, she has focused upon economic growth initiatives primarily through the venues of entrepreneurship and innovation.

As Director of the Southern Colorado Economic Forum, Dr. Bailey serves as an economic development resource to businesses and government within Southern Colorado. She aims to inform audiences about our national and local economy as well as assist the region with leveraging its many assets.

## **Nick Kittle - Performance, Innovation & Sustainability, Adams County**

### ***Session - Government and Philanthropy: Connecting Our Communities***

Nick Kittle is an innovator, leader, facilitator, public speaker and trainer, experienced in working with large groups in a variety of settings to maximize the fun, effectiveness, capacity and abilities of a team of diverse professionals. Kittle started his career in 1999 working for Fortune 100 companies such as British Petroleum, El Paso Natural Gas, and consulting firms such as PricewaterhouseCoopers.



Kittle has also worked for the City of Colorado Springs. He served as a senior manager in the Fleet organization, as a special project manager for the City Manager during the start of the Great Recession, and successfully directed and managed the reformation of Public Works during the transition from a council-manager form of government to a strong mayor form of government. He founded the City's first Office of Innovation and Sustainability from the ground floor, and created the concept of "innovation value" as a way to measure program successes. Kittle is currently the head of Performance, Innovation and Sustainability for Adams County and travels throughout the country to speak on leadership, innovation and sustainability.

## **Tony Macklin, CAP® - Independent Consultant**

### ***Session - Is Your Family's Philanthropy Ready for the Future?***

Tony Macklin is an independent consultant working at the intersection of meaningful giving and community results. He served four years as executive director of the Roy A. Hunt Foundation, a multi-generational family foundation that awards \$3 million nationally. While there, he facilitated a 2020 visioning process and changes in investment management, impact investing, grantmaking, trustee engagement, and back-office management. His dozen years at the Central Indiana Community Foundation included:



philanthropic advising, developing grantmaking programs and community initiatives, attracting \$39 million in charitable funds, and starting a social enterprise. He has served as a speaker, committee member, and board member for a variety of local, state, and national philanthropic associations and grantmakers. You can follow his philanthropy musings at [www.tonymacklin.com](http://www.tonymacklin.com) and Twitter @tonymacklin1.

# 2016 SYMPOSIUM ON PHILANTHROPY - SPEAKERS

## **Jeanne McMains, J.D. - National Christian Foundation**

### ***Session - Charitable Overlays for Advanced Family Estate Planning Strategies***

Jeanne McMains has been a practicing attorney in the areas of estate planning and charitable giving since 1995. After owning her own law firm and practicing with a large Midwest law firm, Jeanne currently serves as an attorney with The National Christian Foundation where she assists families nationwide with their charitable gift planning and estate planning needs.



Throughout her career, Jeanne has served as featured presenter for several financial institutions including A.G. Edwards & Sons, AllianceBernstein, Fidelity Investments, Merrill Lynch, Morgan Stanley, New York Life, Northwestern Mutual, Principal Financial Group and Ronald Blue & Company. She is also a featured speaker for numerous organizations and ministries including: Alliance Defense Fund, Christian Legal Society, Christian Medical Dental Association, Compassion International, Focus on the Family, Kingdom Advisors, Medical Teams International, and the Young Life Foundation.

Jeanne obtained her law degree from Indiana University and her undergraduate degree from Purdue University with highest distinction (summa cum laude equivalent) honors.

## **Frank Mullins - Legacy Wealth Counselors**

### ***Session - Multigenerational Philanthropy: An Antidote to Affluenza***

Frank Mullins knows from personal experience the disastrous effects of failed estate planning. A member of the third generation of what was once an affluent family, Frank has personally experienced the painful reality of

“shirt sleeves to shirt sleeves in three generations.” Frank’s experience, unfortunately, is not unique. Multiple studies confirm that traditional estate planning alone fails to keep families unified and their fortunes together for three or more generations 90 percent of the time. A shortage of excellent technical planning is rarely the cause.



Frank has been in the financial planning and wealth management business for twenty one years. In 2004, Frank completed certification as a Chartered Wealth Consultant from The Heritage institute and began serving as a legacy planner and communications specialist to families of affluence. A lifetime learner, Frank continues to hold the CFP™ and the Chartered Advisor in Philanthropy (CAP) designations.

In February of 2013, Frank sold his RIA business in order to focus entirely on family legacy planning.

## Dr. Bob Seaberg - Intersect Consulting LLC

### *Lunch Plenary - Philanthropy in 2016: Challenges and Opportunities*

Having retired as Managing Director and Head of Wealth Advisory Solutions after eighteen years at Morgan Stanley and its predecessor firms, Smith Barney and Citi Smith Barney, Dr. Bob Seaberg now serves as President

of his own consulting firm. With over thirty years in the financial services industry, as a financial advisor, professional development executive, strategic marketing professional and director of financial and wealth planning, Dr. Bob has achieved a distinguished reputation for delivering lively and reflective client presentations and high caliber professional development programs to industry professionals.

Dr. Bob currently serves as Vice President of the Morgan Stanley Global Impact Funding Trust and as Class of 1969 Gift Agent and President's Club Agent for Colgate University and also serves on the Executive Committee of the Colgate Alumni Council. In addition, Bob has served as a member of the Advisory Council of the Investment Management Consultant's Association (IMCA).



# OUR VISION:

*A generous culture of philanthropy in which people work collaboratively to build a thriving and caring community.*

# OUR MISSION:

*To connect people with causes that matter by advancing philanthropy, creating legacies, and fostering community stewardship.*

We accomplish this by:

- Helping people achieve their charitable goals
- Granting funds to help nonprofits achieve their missions
- Creating permanent endowment funds to benefit our community
- Educating people about philanthropy and encouraging them to act on their interests by becoming philanthropists

# OUR VALUES:

- Integrity – Integrity is fundamental to our ability to serve our donors, our nonprofit clients, and the community as a whole.
- Collaboration – We work cooperatively and with agility for local impact.
- Service and Caring – We treat our stakeholders with respect and dignity. We are a source of knowledge and guidance, and we practice good stewardship.
- Excellence – Our credo for excellence includes ethical and fiscal accountability, and responsiveness to needs and opportunities.
- Responsible Investment – We administer funds and investments with demonstrated financial integrity.



# PHILANTHROPIC SERVICES:

**Donor Advised Funds:** An easy, low-cost, tax-efficient way to help simplify your charitable giving. Enjoy administrative convenience, cost savings, and tax advantages by conducting your philanthropy through your fund at Pikes Peak Community Foundation.

**Donor-Designated Funds:** Donor(s) selects a recipient organization or a specific purpose for which the fund has been created. The Fund's income will be used to make grants to perpetually benefit one or more specific charities or organizations.

**Planned and Deferred Gifts:** Planned gifts enable you to integrate your estate plan with your charitable intent. These gifts provide present or future support for organizations that are important to you, while providing potential valuable tax benefits, income, and other financial returns.

**Charitable Trusts and Gift Annuities:** Estate and tax-planning investments that support your future charitable intent.

## **Other opportunities:**

- Endowment Funds
- Scholarship Funds
- Memorial Funds
- Field of Interest Funds
- Fiscal Sponsor Funds

## **Other services for donors:**

- Charitable Gift Planning
- Charitable Estate Planning
- Consulting

# NOTES

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SAVE THE DATE:

PIKES PEAK COMMUNITY FOUNDATION

SYMPOSIUM ON  
PHILANTHROPY

FEBRUARY 2017

*Please join us for another  
thought-provoking, educational,  
and engaging event!*