UNABLE TO ATTEND?

I am unable to attend, but I would like information on the following financial planning/planned giving strategies below:

Please check all that apply.

- ☐ Bequests and Estate Plan Gifts
- ☐ Income Gifts - Life or Term of Years
  - Charitable Gift Annuity
  - Deferred Gift Annuity
  - Education Deferred Annuity
  - Charitable Remainder Trust
- ☐ Charitable IRA Rollover Gifts (Qualified Charitable Distribution - QCD)
- ☐ Beneficiary Designation Gifts
  - Insurance Policy
  - Retirement Plan
  - Investment
  - Bank Account

....

- ☐ ***I have already included the SU Foundation in my Will or Trust.***
- ☐ I have questions, please call me.
- ☐ Contact me for a personal visit.
- ☐ Send me the link to sign up for the SU Foundation's financial planning e-newsletter.

The best way to contact me is by

☐ Email ☐ Mail ☐ Phone

Name ______________________________________

Street ______________________________________

City/State/Zip ________________________________

Phone ______________________________________

Email ______________________________________

All inquiries are treated with complete confidentiality without cost or obligation. This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

Visit our financial and estate planning website at SUFgift.org

GUEST FEEDBACK

"The financial landscape is constantly changing. If we want to take good care of our families and support our charitable causes in our senior years, we must be aware of the changing environment and adjust our actions to take full advantage of every opportunity.

The Shippensburg University Foundation's seminar offers us an exceptional opportunity to stay current and learn how to use our life's savings to maximize our financial support for what is important to us.

I highly recommend that you take advantage of this Shippensburg University Foundation opportunity."

- - Jerry Warnement '12

"We have attended many of the Financial and Estate Planning Seminars held by the Shippensburg University Foundation. We found that a wealth of information is provided, and we always learn something new regarding the economy, financial planning, and investing.

There have been many good tips on long-term planning that have helped us make decisions with our Will, Power of Attorney and Medical Power of Attorney, and insurances. This helped us realize we needed a solid plan for our latter years, especially to pre-plan our final arrangements with the funeral home. Our families will be thankful for our foresight in taking care of the arrangements that can be stressful during that time.

We highly recommend you attend the Shippensburg University Foundation's free Financial and Estate Planning Seminars to help you think about your own estate plans."

- - Drs. Rodger '62 and Dixie '63 McCormick

Shippensburg University
FOUNDATION

500 Newburg Road, Shippensburg, PA 17257
Phone: (717) 477-1377

SUFoundation.org

Seminar compliments of the
Shippensburg University Foundation

LIVE WELL LEAVE WELL

Plan with a Purpose

ANNUAL ALUMNI DAYS EVENT

Friday, June 2, 2023

8:00 a.m. – 3:00 p.m.
Conference Center at Shippensburg University
John E. Clinton Building
500 Newburg Road, Shippensburg, PA

REGISTER TODAY!

SEMINAR AGENDA

REGISTRATION | 8:00 A.M.
Registration and light breakfast in the Lobby

WELCOME | 8:20 A.M.

KEYNOTE ADDRESS | 8:30 A.M. - 9:30 A.M.
National and Regional Economic Update

RYOTARO TASHIRO, *Senior Outreach Economist*
Federal Reserve Bank of Philadelphia

- How has the economy improved in the past six months?
- What are the current economic challenges?
- What is the inflation outlook?

SESSION 1 | 9:40 A.M. - 10:40 A.M.
2023 Tax Update

JAMES "JIM" A. DEGAETANO '99, CPA, CFP®, MBA
CEO, Founder, Wealth Advisor
Diamond Wealth Advisors

JOEL FLINCHBAUGH '87, CPA
Member of the Firm
Smith, Elliott, Kearns LLC

- 2023 Tax Update – Secure Act 2.0
- Tax Planning Tips
- Qualified Charitable Distribution (QCD) Update
- Capital Gains Tax Planning
- Retirement Contributions
- The Benefits of a Financial Plan and a Net Worth Statement

SESSION 2 | 10:50 A.M. - 11:50 A.M.
What Healthcare Looks Like for Retirees

SARA SIVERS, PPACA
Business Development Officer
Mutual Capital Services

- Health Insurance Options for Retirees Under Age 65
- Traditional Medicare and Medicare Supplements
- Medicare Advantage Plans
- Long Term Care Insurance

LUNCH | 11:50 A.M. - 12:50 P.M.
Giving Wisely

CHRYSTAL K. MIRACLE '06 MBA, CPA
Chief Financial Officer
Shippensburg University Foundation

GREGORY W. FISHER '97
Major Gifts Officer
SU University Foundation

- Qualified Charitable Distributions (QCDs): An IRA Rollover is a smart way to make charitable gifts
- Secure Act 2.0: A unique one-time opportunity to fund a Charitable Gift Annuity (CGA) with funds from an IRA
- "Give it Twice" Testamentary Charitable Trust: Provide for both your children/grandchildren and SHIP students
- Donor Advised Funds (DAF): The importance of naming a beneficiary

SESSION 3 | 12:50 P.M. - 1:50 P.M.
Practicing Safe Computing

GREGORY A. DAY, '98
Director of Information Security
Shippensburg University

We are living in unprecedented times with regards to safe computing. With Phishing and Social Engineering attacks on the rise, this session will provide valuable information on how to protect your identity and assets online.

- Best Computing Practices – Staying safe when online
- Connecting to Networks When Not at Home
- Protecting Your Credentials and Other Digital Assets
- Phishing/Smishing and Social Engineering - What are they and how to combat them
- The Dark Web

SESSION 4 | 2:00 P.M. - 3:00 P.M.
Plan Today, Secure Tomorrow

MARIELLE HAZEN, ESQUIRE
Hazen Law Group

- Financing Long-Term Care (Public and Private Benefits): Medicare, Medicaid, Veterans's Benefits, Long-term Care Insurance
- Protecting Assets for the Family: Pitfalls of Transferring Assets to Children and Planning Strategies
- Essential Estate Planning Documents: Wills, Trusts, Powers of Attorney, Medical Directives

CLOSING REMARKS

REGISTER TODAY!

Register by: May 26, 2023

Seating is FREE but LIMITED

Name 1 ______________________

Name 2 ______________________

Name of Financial Advisor (if attending)

____

Address ______________________

City/State/Zip ______________________

Phone ______________________

Cell Phone ______________________

Email ______________________

Special Dietary Concerns ______________________

Register online:
tinyurl.com/FEPSeminar23
or scan this code with your phone.

Register by phone:
(717) 477-1377

Mail your registration:
A reply envelope is enclosed for your convenience.