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 - Lifetime or Term of Years
  - Charitable Gift Annuity
  - Deferred Gift Annuity
  - Education Deferred Annuity
  - Charitable Remainder Trust
- ☐ Charitable IRA Rollover Gifts
- ☐ Beneficiary Designation Gifts
  - Insurance Policies
  - Retirement Plans
  - Investments
  - Bank Accounts

- ☐ *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 complimentary financial planning e-newsletter.

The best way to contact me is by

☐ Email ☐ Mail ☐ Phone

Name ______________________________

Street______________________________

City/State/Zip ______________________

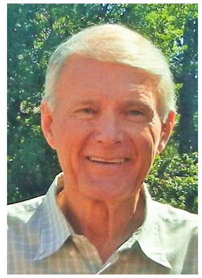
Phone ______________________________

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 Shippensburg University Foundation offers an extremely worthwhile and relevant Financial and Estate Planning seminar each year during the annual Alumni Weekend.

Having attended the seminar during the past two years, I found the presenters to be very well organized and knowledgeable in their respective fields of expertise. Also, they were most accommodating in answering individual questions either during the presentation or at the end of the session. Furthermore, each person in attendance received an information packet containing notes about each session and the presenters."

- - Mr. Laurence W. Reynolds '61

"I enjoy the Estate Planning Seminars and have attended regularly. It is always nice to get back on campus to see what's new and see a few familiar faces. Moreover, I have enjoyed the information presented at these seminars by leaders in their fields. Typically, there is a general economic overview and then sessions on subjects like financial planning, recent tax changes, wills and estates, issues related to health care, cybersecurity, charitable giving and others. The staff works hard to provide variety from year to year and to discuss timely topics. I know I have benefitted from information provided at these seminars."

- - Mr. Don Grell '77

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, May 31, 2024

8:00 a.m. – 3:30 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

WELCOME | 8:25 A.M.

SESSION 1 | 8:30 A.M. – 9:30 A.M.
Financial & Tax Planning
MONICA BALAFOUTAS '10, CFA®, CTFA
Senior VP, Wealth & Trust Investment Manager
Orrstown Financial Advisors

CHRIS S. WEBER '03
Tax and Accounting Associate, Bradley Mentzer, CPA/PFS
- Economic Update
- The Benefits of a Financial Plan and Understanding Your Net Worth
- Tax Planning Tips & Reminders
- 2024 Tax Update – Secure Act 2.0
- Retirement Contributions Overview (RMD and QCD)
- Capital Gains Tax Planning & Loss Harvesting
- Change in Federal Taxes

SESSION 2 | 9:40 A.M. - 10:40 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 for Ages 65+
- Medicare Advantage Plans – Pros & Cons of Medicare Supplements
- Long Term Care Options (Public & Private) – Medicare/Medicaid/Veteran Benefits/Long Term Care Insurance

SESSION 3 | 10:50 A.M. - 11:50 A.M.
Giving Wisely
CHRYSTAL K. MIRACLE '06 MBA, CPA
Chief Financial Officer, Shippensburg University Foundation

THOMAS LONG '86
Major Gifts Officer. Shippensburg University Foundation
- Qualified Charitable Distributions (QCDs): An IRA Rollover is a tax-savvy 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: Smart strategy using retirement assets to provide for both your children/grandchildren and benefit Ship students
- Donor Advised Funds (DAF): The importance of naming a beneficiary

LUNCH | 11:50 A.M. - 12:40 P.M.

SESSION 4 | 12:50 P.M. - 1:50 P.M.
Practicing Safe Computing
GREGORY A. DAY '98
Director of Information Security, Shippensburg University
- Best computing practices – stay safe when online
- Connecting to networks
- Protecting your credentials and other digital assets
- Phishing – what it is and how to combat it
- Social Engineering
- Dark Web
- Artificial Intelligence – AI

SESSION 5 | 2:00 P.M. - 3:30 P.M.
Plan Today, Secure Tomorrow – Putting Your House In Order
LINDA OLSEN, ESQUIRE
Hazen Law Group
- Essential Estate Planning: Wills & Trusts, Beneficiary Designations, Powers of Attorney, Medical Directives, and tax considerations (Federal and PA)
- Nursing Home Planning – Care options, who pays for care, aging in home vs. care facility
- Protecting Assets for the Family: Pitfalls of Transferring Assets to Children and Planning Strategies

CLOSING REMARKS

REGISTER TODAY!

Register by May 24, 2024
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/FEPSeminar24
or scan this code with your phone.

Register by phone: (717) 477-1377

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

"I attend the Financial Planning Seminar for the guest speakers, very knowledgeable and informative, and for the tax and saving tips which help contribute to a happy retirement."
- - Miss Sue Hoke '84