

## UNABLE TO ATTEND?

I am unable to attend, but I would like information on the following 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 monthly 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 [SUGift.org](http://SUGift.org)

## GUEST FEEDBACK

*"My friend Ron and I attended this year's seminar after being away for a couple of years, and we were impressed by how current and relevant the material was. The information shared by subject experts with fellow Ship alumni reflected the changing landscape for seniors and carefully addressed investing, charitable gift planning, and estate planning. It gave us a great deal to consider."*

*- Marleen Steele, '75*



*"We enjoyed the privilege of participating in the Shippensburg University Foundation Estate and Retirement Planning seminar held during Barbara's 50th anniversary reunion, May 2025. The seminar taught us many valuable lessons and pointed out several misperceptions we had regarding how to structure our estate plan to make the best use of our accumulated wealth. What struck us both was the number of those in our group who were attending this seminar for the second or third time; quite a testament to the quality of the speakers and the information shared throughout the seminar. We hope to attend this free event again this year"*

*- Barbara '75 and Scott Risser*

**Shippensburg University**  
**FOUNDATION**

John E. Clinton Building  
500 Newburg Road, Shippensburg, PA 17257  
Phone: (717) 477-1377

[SUFoundation.org](http://SUFoundation.org)

Seminar compliments of the  
**Shippensburg University Foundation**

# Your Life, Your Plan, Your Legacy



**ANNUAL ALUMNI DAYS EVENT**

**Friday, May 29, 2026**

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

# REGISTER TODAY!

**REGISTRATION** | 8:00 A.M.  
Registration and light breakfast provided

**WELCOME** | 8:25 A.M.  
(All sessions are in the Spinnaker Room)

**SESSION 1** | 8:30 A.M. – 9:40 A.M.  
**Financial & Tax Planning**  
**JAMES DEGAETANO JR. '99, CPA, CFP®, CEPA, MBA**  
*CEO and Founder*  
*Diamond Wealth Advisors*

**W. ROBERT BERKEBILE '85, CPA (inactive), CFP®**  
*Senior Financial Analyst and Consultant*  
*OSS Health*

- Economic Update
- The Benefits of a Financial Plan and Understanding Your Net Worth
- 2026 Tax Updates
- Tax Planning Tips and Reminders
- Retirement Contributions Overview (RMD and QCD)
- Capital Gains Tax Planning and Loss Harvesting

**SESSION 2** | 9:50 A.M. - 11:00 A.M.  
**Social Security and Medicare**  
**RACHELLE KINSMAN, RHU, REBC, CSA**  
*Certified Senior Advisor/Medicare Insurance Specialist*  
*Gannon Associates Inc.*

- Traditional Medicare for Ages 65+
- Medicare Advantage Plans vs. Medicare Supplements
- Health Insurance Options for Retirees Under Age 65
- Long Term Care Insurance

**SESSION 3** | 11:10 A.M. - 12:00 P.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 Ship students
- Donor Advised Funds (DAF): The importance of naming a beneficiary

**LUNCH** | 12:00 P.M. - 12:40 P.M.  
*Lunch provided.*

**SESSION 4** | 12:45 P.M. - 2:00 P.M.  
**Plan Today, Secure Tomorrow – Putting Your House In Order**

**LINDA OLSEN, ESQUIRE**  
*Hazen Law Group*

- Essential Estate Planning: Wills and Trusts
- Beneficiary Designations, Powers of Attorney
- Medical Directives for You and Your Family

**SESSION 5** | 2:10 P.M. - 3:00 P.M.  
**Computer and Fraud Safety - AI Technology**

**SHARI MCGEE '98**  
*Senior Cyber Threat Intelligence Analyst*  
*Cybersecurity and Infrastructure Security Agency (CISA)*

- Identify Theft Identification
- Theft/Fraud Protection Tips
- Artificial Intelligence Theft and Fraud
- Vehicle Technology Theft and Skimmers
- Security Devices for Safety

**CLOSING REMARKS**

**Register by May 22, 2026**

*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/FEPSeminar26](https://tinyurl.com/FEPSeminar26)  
or scan this code with your phone.

Register by phone: (717) 477-1377

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

