<table>
<thead>
<tr>
<th>Time</th>
<th>Event Details</th>
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<td>7:30 a.m.</td>
<td>Check in and continental breakfast</td>
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| 8 a.m.       | Welcome and announcements
Rob Kinsey, senior director of development, office of gift planning, Iowa State University Foundation |
| 8:15-9:15 a.m.| **Session 1**
Integrating Wealth Management: Coordinating Advisors Across Disciplines
Scott Snyder, JD, CFP®, CFA, CIMA; Foster Group |
| 9:15-9:25 a.m.| Break                                                                         |
| 9:25-9:35 a.m.| Community Foundations: Providing Charitable Giving Resources
Joe Sorenson, Director of Affiliate Relations, Community Foundation of Greater Des Moines |
| 9:35-10:35 a.m.| **Session 2**
Ten Ways to Draw IRS Attention: Best Practices for Your Family Foundation
William “Bill” Gustoff, JD; Thompson & Associates |
| 10:35-11:35 a.m.| **Session 3**
From Making a Donation to Making a Difference
Rhonda Fitchett, JD, MBA, CFP®, AXA Advisors LLC |
| 11:35 a.m.-11:45 a.m.| A message from Steve Biever, vice president of development, Iowa State University Foundation |
| 11:45-12:30 p.m.| Lunch                                                                       |
| 12:30-1:30 p.m.| **Session 4**
Leaving the Farm or the Business to the Next Generation: Tips For Minimizing Income Taxes, Estate Taxes and Family Fights
Paul Morf, JD; Simmons Perrine Moyer Bergman PLC |
| 1:30-1:40 p.m.| Break                                                                       |
| 1:40-1:50 p.m.| Wealth Transfer in Iowa: Update in Progress
Sandra Charvat Burke, MS; Community Vitality Center and Extension to Communities and Economic Development, Iowa State University |
| 1:50-2:50 p.m.| **Session 5**
A Discussion of Special Needs Trusts and the Alternatives
Gregory L. Kenyon, JD, Bradshaw, Fowler, Proctor & Fairgrave, P.C. |
| 2:50-3:50 p.m.| **Session 6**
The Ethics of Handling Confidential Information
Michael Bootsma, JD, CPA; Iowa State University College of Business |
| 3:50-4 p.m.  | Wrap up and evaluation                                                         |