

New Members of Gerard Circle

Black Hawk Electrical

Charley's Angels
Photography Inc.

StruXture Architects

Western Home
Communities

Call 319-235-3960, or visit unitypoint.org/waterloo, to learn more about Gerard Circle.

Complimentary Estate Planning Consultation



Dr. Eddie Thompson
Thompson & Associates

Upcoming Dates:

- May 11th
- June 8th
- June 23rd

(Seminar, see pg. 2)

- August 10th

To schedule your appointment, please call Mike Lind at 235-3960.

Gerard Circle Recognition Wall is Now Bigger and Better

Thanks to continued support from many loyal donors to the Allen Foundation, we found it necessary to expand the Gerard Circle donor wall. Members of Gerard Circle are those who have lifetime giving or a pledge of at least \$10,000 to the Foundation as well as those who have arranged a planned gift of at least \$50,000 in value.

To accommodate the names of more than 400 donors, the Foundation called in the services of award-winning craftsman, William Close. A retired teacher in the Cedar Falls schools, Close now fills his time with a variety of projects including painting and wood working among others. He is also well-known for his construction of oversized sculptures put on display in front of Peet Junior High for several years.

Close shared, "I was pleased to be asked to put my woodworking skills to use expanding the Gerard Circle donor wall. The need to extend the board indicates the Gerard Circle Giving Society is continuing to grow and will provide support for Allen Hospital and Allen College for years to come. It's good to know the hospital in which I was born continues to lead."

Gerard Circle honors the work of longtime Allen physician and philanthropist Dr. Russell S. Gerard. Aside from recognition on the donor wall, members are also acknowledged in the Foundation's publications and members receive invitations to special Foundation events.

To learn more about Gerard Circle, please call the Allen Foundation at (319) 235-3960. You can also view the full list of current members by visiting www.unitypoint.org/waterloo/foundation.



Bill Close with the new Gerard Circle donor wall.

Allen Foundation to Offer Planned Giving Seminars

The Allen Foundation announces two seminars to be held on Thursday, June 23, at Allen College. The presenter, Johni Hays, JD, is Senior Vice President of Thompson & Associates, a Tennessee firm which consults individuals through values-based estate planning.

From 8 – 11:30 a.m., Hays will present to estate planning professionals “Charitable Planning Using Complex Assets,” “2016 Ethical Case Studies in Charitable Gift Planning” and “Avoiding the Top 10 Charitable Estate Planning Mistakes.” This seminar is designed to update attorneys, accountants, and professional financial advisors on the latest developments and ethical issues in gift planning. Professionals will earn three hours of continuing legal education (CLE) credits, with one of those hours focusing on Ethics. The cost is \$25 per attendee and includes breakfast. Contact Mike Lind, with the Allen Foundation at 319-235-3960 or michael.lind@unitypoint.org to register by the June 15 deadline.

Hays’ afternoon session, “Seven Secrets to Enhancing and Protecting Your Wealth Through Your Estate Plan,” will take place from 4-6 p.m. and is open to the general public. In this session, Hays will explain how to use strategic retirement and estate planning techniques to maximize assets without unwanted pressure. Attendees will learn how to leave more money for their heirs than they thought possible, allowing them to spend less time worrying about finances and more time enjoying their golden years. There is no cost to attend this educational seminar and there will be no solicitation made of guests.

Johni Hays is a national presence in the field of retirement and estate planning. She is the author of the book *Essentials of Annuities* and co-author of the book *The Tools and Techniques of Charitable Planning*. Her many lectures have inspired people to take charge of their financial destinies.

For more information on either of these seminars, or to register, contact Kim French at the Allen Foundation at 319-235-3960.

UnityPoint Health – Prairie Parkway: Update

UnityPoint Health – Prairie Parkway, located in Cedar Falls, will provide patient-centered, coordinated, comprehensive care all in one location. Not to be confused with a hospital, this outpatient medical home will encompass a full range of services for a fast-growing area of the Cedar Valley. Services include: primary and urgent care, internal medicine, OB-GYN, pediatrics, occupational, physical and speech therapy, behavioral health, radiology, a lab, a pharmacy and other specialty clinics.

If you have been near the new campus recently, you have seen tremendous progress to the new facility, which is tabbed to open in early 2017. As this opening date approaches, it is not too late to be a part of this innovative project right here in our community. Help us reach our goal to raise \$4 million for this project by giving or pledging today. To learn more or to donate, contact Dee Vandeventer at the Allen Foundation, at (319) 274-6712 or visit www.unitypoint.org/waterloo/foundation.



CDO Perspective



Dee Vandeventer, CFRE

Early in my career as a fundraising professional, I had a friend who said to me one day, “I could never go around begging people for money. I don’t know how you do it.”

My quick and short response to this comment was simply, “I couldn’t either.”

I continued to share; fundraising isn’t about begging for money, prying dollars from reluctant hands or twisting arms. Fundraising is about facilitating.

Donors have needs. We are fortunate enough to work with a variety of generous people in our community who want to make a difference. They have a philanthropic intent and are searching for projects that are important to their passions and to the community.

Just like any other nonprofit, UnityPoint Health – Allen Hospital and Allen College have needs that cannot be met without philanthropic support.

My role is to facilitate the intersection of these needs and produce “Development Magic.” – when a donor’s personal story connects with a philanthropic opportunity.

I love the work that I do, because I know I am making a difference. Thank you for your generosity. Your support allows the Allen Foundation to support high quality healthcare and healthcare education.

Chief Development Officer