



“Current Issues and Opportunities in Charitable Gift and Estate Planning”

Professional Advisors Workshop

June 10, 2010

8:15 am – 12:00 pm EDT

Ancilla College, the Marshall County Community Foundation and the Starke County Community Foundation, are pleased to sponsor THREE HOURS of CLE, CPE, and CEU continuing education credits (including One hour of Ethics credit) for Accountants, Certified Financial Planners, CLU/ACLU Life Insurance professionals, Bank Trust Officers, and Attorneys.

Phil Purcell will present topics that include the following three topics:

- 1. Introduction and Overview of Planned Giving Techniques:** discussion on the various outright gifts, deferred gifts and life income plans
- 2. Considerations for Establishing an Endowment at a Community Foundation, College or Other Charitable Organization:** discussion on Indiana’s new law for charitable endowments, investment and spending policies and accounting for endowments
- 3. Ethical Considerations in Charitable Gift and Estate Planning:** case studies of good gifts gone bad, recent news from the courts, IRS and the Indiana Attorney General

Cost: \$35.00 per person

When: June 10, 2010, 9:00 am to 12:00 pm EDT. Registration is from 8:15 am - 9:00 am EDT.

Where: PHJC Ministry Center, Cana Hall, located with Ancilla College at 9601 Union Road, Plymouth, IN.

Breakfast will be provided starting at 8:15 am EDT. Please feel free to invite other professional advisors to this seminar.

“Current Issues and Opportunities in Charitable Gift and Estate Planning”

Name(s): _____

Address: _____ City: _____ State: _____ Zip: _____

Phone Number: _____ Email: _____ Profession: _____

Registration Deadline: June 1, 2010. Make checks payable to Ancilla College. Check Enclosed

Mail to: Office of Institutional Advancement, P.O. Box 1, Donaldson, IN 46513-0001

Credit Card: Card Type: Visa Discover Mastercard Payment Amount: \$ _____ Exp. Date ___/___ CV2 _____

Card # _____ Name on Card: _____ Signature: _____

For more information call Todd Zeltwanger at 574-936-8898, ext. 3345# or toll free at 866-262-4552, ext. 3345# or email todd.zeltwanger@ancilla.edu

Total Enclosed: \$ _____

Philip M. Purcell, JD

Vice-President of Planned Giving and Endowment Stewardship
Ball State University Foundation

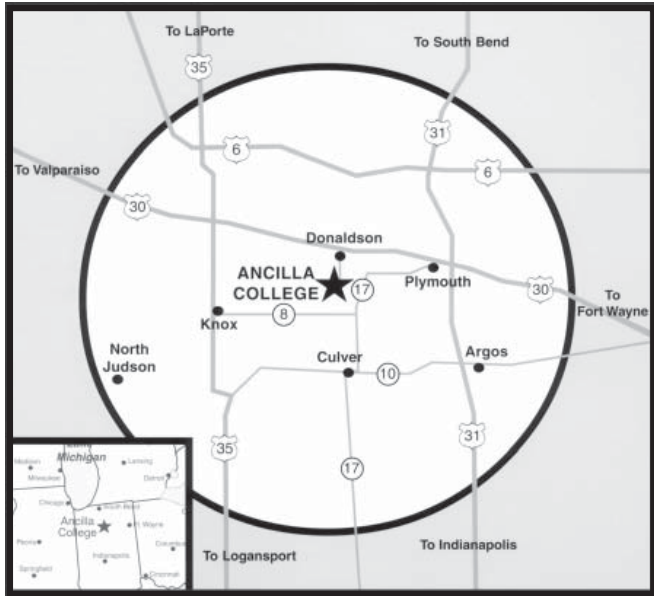


Phil Purcell currently serves as Vice-President for Planned Giving and Endowment Stewardship at the Ball State University Foundation where he is assisting with the completion of a \$200 million campaign, including \$50 million in planned gifts toward which \$56 million planned gifts has been raised. Formerly, he served as Director of Gift Planning for the Central Indiana Community Foundation (Indianapolis, IN), Director of Development for St. Vincent Hospital Foundation and Director of Planned Giving and Development Counsel for Rose-Hulman Institute of Technology. Phil is an attorney and member of the American and Indiana State Bar Associations.

Phil has consulted on behalf of all types of charitable organizations, including the Lilly Endowment’s GIFT program serving community foundations throughout Indiana. He has spoken on topics related to nonprofit governance and philanthropy before the National Conference on Philanthropic Planning, Council for Advancement and Support of Education, American Council on Gift Annuities, United Way of Central Indiana Nonprofit Training Center, Indiana Grant-makers Alliance annual conference, Indiana Continuing Legal Education Forum, Indiana CPA Society, and on behalf of charities, bar associations and local estate planning, planned giving and fundraising chapters throughout the country.

Phil received his B.A. degree from Wabash College in 1981 (magna cum laude) and his J.D. and M.P.A. degrees (with honors) from Indiana University in 1985.

Directions to Ancilla College and PHJC Ministry Center: Cana Hall



Ancilla College is located at 9601 Union Rd. in Plymouth, Indiana -- just 2 miles south of U.S. 30.

Coming from the East: Take U.S. 30 west 9 miles from the U.S. 31 and U.S. 30 interchange to Union Road [green sign: Ancilla College]. Turn left [south] on Union Rd. through Donaldson.

Coming from the West: Take U.S. 30 east to Indiana 23. Travel 3.3 miles on U.S. 30 from Indiana 23 to Union Road [green sign: Ancilla College]. Turn right [south] on Union Road through Donaldson.

Coming from the North: Take U.S. 31 south to U.S. 30. Turn [right] west 9 miles from the U.S. 31 and U.S. 30 interchange to Union Road [green sign: Ancilla College]. Turn left [south] on Union Rd. through Donaldson.

Coming from the South: Take U.S. 31 north to U.S. 30. Turn [left] west 9 miles from the U.S. 31 and U.S. 30 interchange to Union Road [green sign: Ancilla College]. Turn left [south] on Union Rd. through Donaldson.

Travel 1.7 miles to where Union Rd. makes a “T” at 9B Road. Turn right at the stop sign. The College will be on your left. The main College entrance faces the parking lot. You may park in Lots A, B, or C and enter the College at either the north or south doors. Signs will then direct you to Cana Hall.

