5% Transfer of Wealth Campaign

April 14 through June 30, 2021
VISUAL MARK

5% INVESTED
FULLY COMMITTED

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Call to Action, Wave 1, April 14 - June 30

• Partner with Leadership Councils and Innovia team to build local endowments

• Utilize the Collateral
  o Use the Partner Toolkit to promote the 5% campaign
  o Share collateral and upcoming workshops with nonprofits, professional advisors, neighbors, and friends who care about their community

• Provide Feedback for Future Waves of Campaign
  o How is the collateral being received?
  o What is working, what is not working?
Call Innovia with Any Questions; 509.624.2606

Thank You!
Endowment Building Workshops

• April 14- 5% for What? Tangible Strategies to Maximize the 5% Transfer of Wealth Opportunity (part of Innovia’s Leadership Summit Series)
  o Deborah Markley, Locus Impact Investing and Jeff Yost, CEO of the Nebraska Community Foundation

• May 5- Grow Your Nonprofit Endowment
  o Kristen Mihaljevic, Arizona Community Foundation and Judi Smith, President of GivingSMITH.

• June 2- Charitable Gift Planning Strategies
  o National speaker and former Arizona Community Foundation executive, Judi Smith, MA, CFRE, President of GivingSMITH.
Professional Advisor Roundtable Series

• April 21- Fund Types at Innovia Foundation to Support Your Clients’ Charitable Needs
  o Jeff Feuerstein, Denise Stewart, Andy Hastings, David Green, and Innovia Staff

• June 10- Consider Leaving 5% to Charity – Current Developments and Tax Saving Strategies in Estate Planning
  o Paul Viren, Viren and Associates and Terry Kelley, Lee & Hayes