

**5%**

INVESTED

---

FULLY  
COMMITTED

**5% Transfer of  
Wealth  
Campaign**

*April 14 through June 30,  
2021*

# VISUAL MARK



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

- **Partner with Leadership Councils and Innovia team to build local endowments**
- **Utilize the Collateral**
  - Use the Partner Toolkit to promote the 5% campaign
  - Share collateral and upcoming workshops with nonprofits, professional advisors, neighbors, and friends who care about their community
- **Provide Feedback for Future Waves of Campaign**
  - How is the collateral being received?
  - 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)**
  - Deborah Markley, Locus Impact Investing and Jeff Yost, CEO of the Nebraska Community Foundation
- **May 5- Grow Your Nonprofit Endowment**
  - Kristen Mihaljevic, Arizona Community Foundation and Judi Smith, President of GivingSMITH.
- **June 2- Charitable Gift Planning Strategies**
  - 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**
  - 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**
  - Paul Viren, Viren and Associates and Terry Kelley, Lee & Hayes