

Michele A Novachek (88)



Time to complete: 06:21

1. Please select your UC Committee

0 / 0 pts

Auto-graded

- Awards Special Committee
- Budget and Finance
- Communication
- Information Technology
- Institutional Advancement
- Physical Environment
- Recreation and Wellness
- Student Engagement and Success
- Talent Development and Human Resources
- ad hoc Human Development

2. Did the Committee meet this month? If you met, select Yes and complete the rest of the survey. Provide minutes in question 7. You do not need to upload documents unless they are supporting materials for this month's meeting.

0 / 0 pts

Auto-graded

If you did not meet, select No and submit the survey. You do not need to complete the rest of the survey or upload any documents. Thank you for logging this month's meeting status.

- Yes
- No

3. Date of Meeting

0 / 0 pts

Auto-graded

2/12/2021

4. Committee Members in Attendance or Absent With Notice 0 / 0 pts
Auto-graded

All members in attendance

5. Committee Members Absent Without Notice 0 / 0 pts
Auto-graded

No answer provided.

6. Based on your goals for the year, outline what decision were made or action items discussed during this month's meeting that moved goal(s) forward 0 / 0 pts
Auto-graded

Presentations are helpful to committee to understand how development works.

7. Provide Meeting Minutes/Monthly Report here (do not attach minutes as a document in #8 below). 0 / 0 pts
Auto-graded

Lia Jones, Director of the Center for Gift and Estate Planning gave a presentation:

Defined Planned Giving

Discussed Ways to Give

Giving Vehicles – Bequests, Beneficiary Designation, Life Income Gifts

Donor Benefits – Create a lasting legacy at UA; tax benefits

FY20 Statistics:

21 commitments; average commitment: \$206,221

15 Planned Gifts Realized: 15 bequests/beneficiary designation; \$387,589 average commitment

QCDs (IRA Charitable Rollover): 109 QCDs; Average gift: \$2,553

8. If you have a document that provides supporting materials for this month's work, upload here. This attachment should not be the monthly minutes (minutes should be submitted in #7 above). 0 / 0 pts
Auto-graded

No answer provided.

9. Are there any new topic submissions or other information/feedback you would like to share from the committee? 0 / 0 pts
Auto-graded

No answer provided.

