



Business Managers Forum December 1, 2020 CFSWIA

For Agency Fund holders and others:

- **Important to schedule** a 1:1 review of your fund with CFSWIA and your Finance or Parish Council members.
- **Market your fund(s)** by adding a descriptor to your fund page
- We will hold **quarterly investment portfolio reviews for anyone**. We will review portfolio returns and open it for any questions concerning your funds. Those meetings will be at 4:30 pm on:
 - Thursday, February 4, 2021
 - Thursday, May 6, 2021
 - Thursday, August 5, 2021
 - Thursday, November 4, 2021

For All:

- **Virtual Webinars**-5-10 minutes of information on:
 - Gifts of Grain
 - Gifts of Vehicles
 - Iowa 529 Plans
 - Planned Giving
 - Gifts of Stock
 - IRA Qualified Charitable Distributions

All information is located on our website at the top, under Webinars. Please help us get these into your bulletins. Rachel Seidl will be sending out the information yet today.

- **Resources for your parish**
 - Planned Giving-we are your Planned Giving Office
 - Bulletin ads in jpg/pdf form to help spread the word about ways to give

Paycheck Protection Program (PPP)

If you have not yet heard back from your lending institution about the forgiveness of your loan, call them. They may be waiting for you to fill additional paperwork out, or for additional information on 941's and SUTA.

For any questions or additional information please call:

515-237-5044 CFSWIA main office-for now you will have to leave a message and we will call you back.

515-380-4856 Sue McEntee mobile or email at

contact@catholicfoundationiowa.org

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