Already Have Tax Advisor/Accountant … What Can the Advisory Council Do for Me?

On a day-to-day basis, most of us manage our finances using our accountant or tax advisor. However, when it comes to complex estate plans and kingdom giving, there is great benefit to you and the recipient of your gift, in consulting a group of experts. God has brought to One Challenge a team of professionals whose business is exactly that. They are ready to provide their services to you free of charge.

Advisory Council lead, Jeff Jensen, explains the council's role through one donor's experience.

"An individual with a little-used property approached me and asked how it could be contributed to kingdom philanthropy. This was someone that knew OC for a very long time. They wanted to give this resource to OC unrestricted, entrusting OC to use it where they felt was the best place.

What a great honor to have someone say, 'Take care of this job.' Because of our experience, the Advisory Council knew who to connect with and how to get it done. As a group, we worked out the details, including meeting with the donor's CPA and attorneys.

These things are never easy. There were a lot of challenges, but the team stayed to it and we made it a successful transaction. The tax deduction benefited the donor, and they blessed OC with a substantial gift, which the individual just loved. It was an incredibly positive experience for everyone."

Questions for You to Consider …

- Do you have a concern regarding a family trust or other asset?
- Is there an area of your estate planning that is high risk?
- Would you like to consult someone on the OC Advisory Council to help you make your wealth management plans even better?

"After more than two years of regular work together, Jeff, Jeanne, and Steve have proven their commitment to helping families achieve their goals. We have seen them at work for no benefit to themselves, only to the kingdom and the families they were helping. Many of us have already used their services and we know we can trust them and trust you into their care."

Dean Carlson, President, One Challenge

If you, or someone you know, would like to take advantage of this service, please send their name and contact information to Rich Haynie at (719) 271-9274 or RichHaynie@oci.org.

You may also contact Jeff Jensen at (719) 577-6321 or Jeffrey.L.Jensen@Morganstanley.com.

One Challenge
OC INTERNATIONAL MINISTRIES

Introducing the Advisory Council

… helping OC workers and donors fulfill their kingdom philanthropy goals with optimal asset management

"Without consultation, plans are frustrated, but with many counselors they succeed."

Proverbs 15:22 (NASB)

Advisory Council … What You Can Do Together

Are you looking for financially savvy ways to use your non-cash assets for God's kingdom? This team is offering their expertise on a volunteer basis. Nothing gives them more joy than seeing your giving wishes accomplished in the best way.

One Challenge has a team of independent, volunteer advisors available to serve you. This could be of value to you, particularly if you are looking at a generational transfer of assets.

The purpose of our Advisory Council is:

"to provide independent (neutral) counsel in asset (net-worth) philanthropy"

Our advisory team has expertise, experience, and connections to experts in many areas including:

- Wealth management
- Family trusts
- Asset management (businesses, property, artwork, jewelry, antiques, stock)
- Helping develop a family philosophy of giving

The basic counsel is **free and fully confidential**. One Challenge provides this service as a blessing to donors and to God's Kingdom.

Jeff L. Jensen, SIMC

Advisory Council Lead

"I served on the OC board for nine years, where I got to know the people and the financial structure of OC. I believe God was training me, and challenging me, to volunteer my time to assist donors. God has called me to be an advocate for people - to protect the financial wishes of those who do not have the knowledge or the expertise. I've gotten to do that many times and I love it!"

Jeff is a Senior Vice President and Family Wealth Director with Morgan Stanley's Wealth Management division. He joined Morgan Stanley in 1994 and manages assets for his clients who reside primarily in the greater Colorado Springs area. Jeff has dedicated his entire financial career to providing highly customized advice and investment solutions to affluent families, business owners, foundations, endowments, non-profit organizations, and corporations. He focuses on developing and managing tailored investment portfolios.

Jeanne McMains, JD

Jeanne has been a practicing attorney in the areas of estate planning, business succession and family philanthropy since 1995. After owning her own law firm and practicing with a large, Midwest law firm, Jeanne has served as a gift planning attorney with the National Christian Foundation since 2004.

In addition to her work with NCF, Jeanne founded Foreground Solutions, LLC through which she provides professional speaking, writing and legacy impact coaching services.

"In my 35 years of working with donors of more than 150 ministries, I have found not a single attorney who better displays a combination of technical expertise in charitable tax law; but also the relational ability to "connect" with a high net worth family. This planning arena is extremely personal: you are dealing with the fruit of a lifetime of effort. Jeanne is able to take complex strategies and make them simple."

Greg Ring, Co-Founder – Fulcrum Philanthropy Systems

Steve Marken, JD, CSPG

Steve is an accomplished attorney and consultant to wealth managers throughout the country. Steve is a nationally recognized expert adept at overseeing estate plans that holistically and multi-generationally integrate a family's financial (material), human (people) and social (philanthropic) capital.

Recognized as a Certified Specialist in charitable tax planning by the American Institute of Philanthropic Studies, Steve intimately understands the role of philanthropy in the wealth equation and how it can be a powerful antidote to the risk and challenge of "affluenza", while also serving as an unparalleled means of uniting families around common values and interests in the building of a lasting family legacy.