

IAAP NEWSLETTER



May 13, 2007
Edition

“Basic Tools of Estate Planning” by Richard Freeman, Attorney at Law

The basic components of most estate plans, in conjunction with appropriate tax planning, are:

- Will
- Trust
- Durable Power of Attorney for Property
- Health Care Directive
- Common Ownership of Property
- Long Term Care Planning

One or more of these components are used within most estate plans.

A Will provides for the disposition of property held in your name only or as a tenant in common. It is a road map for your family. Some common reasons for needing a will include:

- Control of who receives your property, not state law deciding it for you
- Provisions for minor children
- Provisions for surviving spouse
- Distribution of assets among beneficiaries
- Aid in estate tax planning (eliminate or minimize estate taxes)
- Selection of executor of your estate
- Probate vs. Non-Probate Property

A Trust is an entity created either by Will or by a separate agreement during life. Its most basic purpose is to hold property for the benefit of the beneficiaries of the trust pursuant to a specific set of instructions. Property held by a trust is not subject to probate. There are four types of trusts:

- Testamentary – created by the Will of the deceased
- Inter Vivos – created by an individual while still alive
- Revocable – can be revoked, modified or amended at any time by the person who created it
- Irrevocable – cannot be revoked, modified or amended after it is established

There are two types of Powers of Attorney: Financial/Property and Health Care. This allows someone to continue to manage your affairs in the



event of your disability to do so. This avoids the need for a guardianship and being declared incompetent by the Court.

A Health Care Directive is a written statement by you stating your wishes and intentions regarding medical treatment in the event you are

unable to respond directly to the medical provider. There are four types of health care directives:

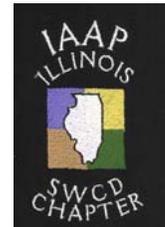
- Health Care Power of Attorney – allows you to name someone to make health care decisions on your behalf
- Living Will – somewhat limited in scope and application, this document is a declaration of your intent regarding provision of “extraordinary” medical treatments
- Other forms – you are not required to use state created forms; however, there is a risk of misinterpretation by the medical provider or the Court
- Health Care Surrogate Act – unwise to rely on this Act to handle your wishes

Common Ownership of Property and Transfer Taxes are outlined in the handout available on the Chapter Website.

Long Term Care Planning involves three basic ways of dealing with costs: Medicaid, self insure, and long term care insurance. Again, refer to the handout available for download on the website.

Mr. Freeman relayed vital information to our group on this important topic. He concluded with four points to remember:

- If you don’t have a will or estate plan, get one.
- Do powers of attorney for property and health care, and tell your family about them.
- If your gross estate approaches or exceeds \$1 million, you need to do estate tax planning. Don’t be fooled into thinking you don’t have that much, do the figures, you’ll be surprised at how much you really own.
- Address long term care issues and costs now so your spouse and children aren’t burdened later.



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Special points of interest:

- Are you a charter member of IAAP?
- Serve on a committee!
- Minutes from last meeting
- Learn more about Emily...
- Congrats to Dee!
- Office Manners

Congratulations - IAAP Anniversaries

May

Vicki Gregg 2 yrs

June

Dee Agans 6 yrs

Deb Baker 6 yrs

Colleen Bogner 6 yrs

Jane Brangenberg 6 yrs

Wendy Brokaw 6 yrs

Sue Davis 6 yrs

Debbie Holsapple 6 yrs

Norma Kuethe 6 yrs

Sharon Matson 6 yrs

Rita May 6 yrs

Cindy Moon 6 yrs

Donna Roads 6 yrs

Laura Snowden 1 yr

Denise Willenborg 1 yr

Judy Wilson 6 yrs

July

Jill Brammeier 3 yrs

Anne Rollins 3 yrs

- All members with 6 yr anniversaries are charter members

Birthdays This Quarter

May 3 Dee Agans

May 22 Donna Roads

May 25 Joy Dierkes

June 2 Debbie Holsapple

June 18 Sharon Matson

June 25 Rita May

June 30 Wendy Brokaw

July 1 Sue Davis

July 2 Norma Kuethe

July 27 Bonnie Schone

Other Important Dates

May 13 Mother's Day

May 28 Memorial Day

June 14 Flag Day

June 17 Father's Day

July 4 Independence Day

July 18 IAAP Meeting

July 29-31 Summer Conference

Serve on a committee!

The July meeting will include reorganizing of committees. Please consider serving your chapter by being a committee member or chairman. You can learn valuable leadership and organizational skills by serving on a committee. Committees include By-Laws, Membership, Finance, Audit, Program, Public Relations, Nominating, Fundraising, and Historian. Or maybe you have a suggestion for a new committee to help our chapter move forward. Known vacancies are on the By-Laws and Membership Committees. Choose a committee and reap the benefits of IAAP!

Web Address:

<http://iaap-swcd.tripod.com/>



President's Corner

Bonnie Schone
Scott County SWCD
656 N. Main Street
Winchester, IL 62694



Greetings!

The past couple of months have been quite eventful for our chapter. Chapter officers held a meeting in late February to plan for the April and July meetings. Several ideas to commemorate Administrative Professional's Day and Week surfaced, with the Laptop Fundraiser being the chosen event. It proved to be a popular and profitable idea. The chapter gained not only attention for the day set aside to honor admins, but also \$317.00 in profit. Congratulations to Dee Agans on being the lucky winner. I want to thank everyone who participated in the fundraiser. The funds gained by this will help make your chapter more beneficial to you.

The April meeting was well attended as members welcomed Karla Shaffner and Beth Leamon as guests. The cake and punch reception to honor our members was also attended by Mike Rahe, Rich Nichols, and Stacy Stremsterfer. Mike offered encouragement and appreciation for the many tasks we all perform every day. The program on Estate Planning was very informative. Members had the opportunity to ask questions as material was covered. The importance of "a plan in place" was emphasized. The handout from this session has been posted by Jill Brammeier on the chapter website.

The July meeting will include a presentation on "Netiquette" with an emphasis on e-mail etiquette. The afternoon program will be conducted by a dietician from St. Johns Hospital. I

might also mention that we will reorganize committees at the July meeting. Please consider serving on a committee. By holding a position of leadership within the chapter, our members can take advantage of all that IAAP has to offer. It is my hope that next year's committees will take an active role in helping our chapter grow.

I hope everyone enjoys their summer and I look forward to seeing you all at the next chapter meeting.

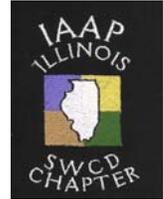
...Bonnie

IAAP Mission, Objectives, Purpose, Vision and Core Values

- The IAAP **mission** is to be the acknowledged, recognized leader of administrative professionals and to enhance their individual and collective value, image, competence, and influence.
- IAAP's **purpose** is to provide information, education, and training and to set standards of excellence recognized by the business community on a global perspective.
- IAAP's **objectives** are to elevate the standards of all administrative professionals and to promote their working relationships with management through continuing education, authorized programs, and publications.
- IAAP's **vision** is to inspire and equip all administrative professionals to attain excellence.



International Association of Administrative Professionals®



Chapter Number: 102365
Chapter Name: Illinois SWCD
Division No.: 102000

Minutes
Business Meeting
April 18, 2007

Members Present:

Deb Baker, Colleen Bogner, Jill Brammeier, Jane Brangenberg, Wendy Brokaw, Betty Buckert, Melissa Cauble, Sue Davis, Emily Gilmore, Debbie Holsapple, Sharon Matson, Rita May, Brenda McMillan, Cindy Moon, Phyllis Muse, Donna Roads, Anne Rollins, Bonnie Schone, Susan Scott, Teija Smithers

Members Absent:

Dee Agans, Joy Dierkes, Vicki Gregg, Norma Kuethe, Sheila Lane, Holly McIlrath, Judy Meislahn, Karen Sanders, Laura Snowden, Kathy Stich, Denise Willenborg, Judy Wilson

Guests:

Beth Leamon, Douglas County SWCD; Karla Shaffner, Clark County SWCD

President Bonnie Schone called the meeting to order at 10:00 a.m. The Pledge of Allegiance was recited. Roll call was taken and a quorum was present. Bonnie welcomed guest's Karla Shaffner, AC in Clark County, and Beth Leamon, AC in Douglas County.

Old Business:

Minutes of the January IAAP meeting were reviewed. Sharon Matson made a motion to accept the minutes. Brenda McMillian seconded the motion. All were in favor. **Motion carried.**

The Treasurer's financial statement for January 1, 2007 through March 31, 2007 was summarized by Sue Davis. Emily Gilmore made a motion to accept the financial statement. Phyllis Muse seconded the motion. All were in favor. **Motion carried.**

New Business:

Committee Reports:

By-Laws – Term of office wording was discussed and a decision was made to leave the wording as written.

IAAP SWCD Chapter Policy – Chapter Member Bereavement Gift was reviewed. A motion to adopt this policy was made by Betty Buckert. Second by Brenda McMillian. **Motion carried.**

Policy reads: *Upon the death of a close family member (parent, sibling, spouse, or child) a floral or memorial gift will be sent from the chapter to the member (not to exceed \$50)*

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- Membership – Betty Buckert presented pins and packets to new members: Emily Gilmore and Teija Smithers. Pins were also presented to Debbie Holsapple and Jane Brangenberg for recruiting the new members.

- Finance – Report attached.

- Audit – No report at this time. Debbie Holsapple was asked to perform the audit and report her findings at the next meeting in July.

- Program – Bonnie reported the July meeting program will be on “Netiquette” for the group activity and the afternoon session will be conducted by a dietician from St. John’s Hospital on enhancing brain activity by the foods we consume.

- Public Relations – Jill Brammeier reported on the new IAAP Web Community offered to all chapters. It was determined to remain with our current website provider due to cost and content of the site. Concerns with pop-ups on our website were addressed. Tri-Pod can block these unwanted pop-ups for a \$14.95 initial one time fee and \$4.95 per month. A motion was made by Sharon Matson to pay the initial cost and per month cost for one year and then readdress the issue. Debbie Holsapple seconded the motion. **Motion carried.**

AISWCD will provide a link to our website on their website.

Bonnie asked members to submit interesting articles for the newsletter and for volunteers for the “Members Spotlight” page. Emily Gilmore agreed to be featured in the next newsletter.

- Nominating – We discussed the problem of having an officer on the nominating committee. Since Susan Scott is on the nominating committee, she has decided to abstain from this position since she is an officer. According to the By-Laws, the president can appoint a new nominating committee member to replace Susan, or the nominating committee may remain with just two members. The decision was made to leave the committee with just two members.

- Fundraising –

Cookbooks: We have approximately 175 cookbooks left for sale. A full page ad will appear in the June issue of IL Country Living magazine featuring the chapter cookbook. Bonnie will e-mail members the page from the magazine so that all can see what recipes were featured. Bonnie further mentioned the need to deplete the inventory of cookbooks, as storage is a problem and the cookbooks are dated. Officers have discussed a method of exhausting the inventory; however, we first would like input from the members on ideas for completing this fundraiser. Please forward your ideas to the officers prior to the July meeting, as we will have a plan in place and expect all members to take part in this plan so that we can put the cookbook fundraiser to rest.

A few members voiced that they were told by fellow AC’s and RC’s that they would like to have our bake sale items at Winter Training. The members decided to discuss this again at a future meeting.

Laptop Computer Raffle: The total cost for the laptop was \$551.00, including a \$20 upgrade to a 15.4 inch widescreen, and taxes. Members in attendance turned in raffle tickets and money sold prior to the meeting. All other raffle tickets need to be sent to Bonnie by email or fax by 12:00 p.m. on Friday, April 27th. The drawing will be held in Scott County, with the winning ticket drawn by Scott County Clerk, Barb McDade. After the winner receives the laptop, the chapter would like a picture of the winner with the laptop for our newsletter and scrapbook.

- Historian – Judy continues to update the scrapbook with chapter news. Anyone who has pictures or articles that appear about the chapter, please forward to Judy.

Committee’s –The July meeting will include choosing new committee members. Please consider which committee you would like to serve on, but also be prepared to do the work involved with the committee. There may be a need to form new committees, such as, Administrative Professionals Week committee, or a scholarship committee if funds allow awarding a scholarship. Serving in a leadership position within the chapter allows members to take full advantage of what the chapter can offer them. Notify one of the officers if a particular committee interests you.

Summer Conference Session – Our IAAP Chapter will sponsor a session on Microsoft Publisher at Summer Conference this year. Lincoln Land Community College will provide the speaker. This session will be on Monday, July 30, from 10:40-11:30 a.m. Attendees may bring laptops to follow along with the instructor; however, computers are not required. Jane Brangenberg agreed to serve as moderator. Further mentioned, AISWCD will not need our help decorating this year.

Avery Chapter Achievement Award – Our chapter submitted an application for this award. In doing so, Avery will either donate to the IAAP Research & Development Center or provide a patio paver engraved with our chapter name

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Member's Corner

Emily Gilmore, AC, Edgar County

Little did I know what being an administrative coordinator would lead to when the Edgar County SWCD hired me part time in January of 1988 to do “a little typing and filing” and work with the latest technology, a 6300 pc. My predecessor assured me the most important part of my job would be making sure I got the right stamp on the right envelop when mailing a letter for the district or NRCS!

My job has always been interesting and varied. One of the things I like best about it is you never know what you will be called upon to do each and every day. “A little typing and filing” led to on the job training in a variety of subjects I had never even thought about. Who knew Edgar County’s 398,688 acres contained 46 different types of “dirt”, I mean soil. Coming on at the same time as a farm bill that required HEL determinations on all tracts in the county, I was quickly acquainted with aerial photography and soil maps. I counted more dots on soils maps that I care to remember. I’ve learned all about the planting and care of trees and native plants through our spring sales. I learned what chemicals to recommend for pond weeds and what type of fish to stock. I can help survey and know what a WASCOD is. My organizational skills have improved due to planning many annual meetings, land user informational meetings, pond shocking, conservation tours, etc. My creative urges even have an outlet by working to create displays for Summer Conference, the local fair, our annual Holiday Lights in the Park display, and table decorations for annual meetings.

But the best part of the job is all the great people I have had the chance to meet over the years. Being part of the employees committee for several years was one of the best choices I have made while with the district. It afforded me the opportunity to meet employees from all over the state. Now through IAAP I am still meeting more. I now have a second family made up of district and NRCS employees all across the state. I always say that for

a “little ol job” in a very small office it’s great to know that one could travel to any county in the state, have car trouble and know there is someone close by at the local district office you could call on for help. (Tip, always carry a district directory in your car just in case.)

On a personal note my husband Alan and I recently relocated from Paris to Mattoon where he is City Administrator. My two sons are both grown; Andrew, a carpenter for a production company, lives the big city life in New York City. In the past he has traveled over 59,000 miles across the US with “Blues Clues Birthday Party” and “Dr. Doolittle” starring Tommy Tune. Kevin, an avid ice hockey/ Pittsburgh Penguins fan, upon getting out of the Air Force returned to Paris and works for DCFS in Coles County. Alan has two daughters, both students at SIU. When not attending classes Holly works at the Brim Center and Chambry works as an assistant manager at Sidetracks in Carbondale. His son Harlan is completing his freshman year at Miliken and in his off time is the “head soda jerk” at the Candy Kitchen in Tuscola.

My hobbies include home improvement projects and travel. Alan has threatened to put a parental block on the HGTV Channel to stop me from getting any more home improvement ideas! We both love coming home from work and relaxing in our back yard around the fire pit with a nice glass of wine (me) cold beer (him), where friends and neighbors often drop by. Travel is a big part of our spare time too. Since being married in 2002 we’ve traveled to Mexico, New York City, the Grand Canyon, Denver, Omaha, San Antonio and San Angelo, TX, New Orleans and Natchitoches, LA, Kentucky Lake, Gatlinburg, and all the states in between. Most of the time we try to travel by secondary roads and avoid the interstate. We find lots of interesting out-of- the way places this way. Our trips are now centered on finding just the right retirement location.



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Minutes

Annual Meeting

April 18, 2007

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Members Absent:

Dee Agans, Joy Dierkes, Vicki Gregg, Norma Kueth, Sheila Lane, Holly McIlrath, Judy Meislahn, Karen Sanders, Laura Snowden, Kathy Stich, Denise Willenborg, Judy Wilson

Guests:

Beth Leamon, Douglas County

President Bonnie Schone called the IL SWCD Annual Meeting to order at 11:10 a.m.

President's Report:

Bonnie Schone presented her report to the members. This report was also submitted to the Illinois Division President for inclusion in a booklet presented at IDAM. Report attached.

Code of Ethics:

The IAAP Code of Ethics was recited by all present.

Election of Officers:

Nominating committee member, Colleen Bogner, conducted the election of officers. Colleen presented the following slate of officers for 2007-2008: Bonnie Schone, President; Jane Brangenberg, Vice-President; Susan Scott, Secretary; and Sue Davis, Treasurer. Colleen asked for nominations from the floor three times. With no nominations from the floor, Donna Roads motioned to accept the slate of officers as presented. Jill Brammeier seconded the motion. **Motion carried.** The IL SWCD chapter officers will be installed during the Installation Ceremony to be held in July.

Annual Meeting minutes:

The minutes of the previous Annual Meeting in 2006 were unavailable for approval. No action was taken.

Annual Budget Presentation and Adoption:

The annual budget was presented by Treasurer, Sue Davis. Budget attached. A motion was made by Anne Rollins, seconded by Rita May, to accept the budget as presented. **Motion carried.**

Adjournment: Debbie Holsapple made a motion to adjourn the meeting at 11:35 a.m., Teija Smithers seconded the motion. All were in favor. **Motion carried.**

Respectfully Submitted,
Susan Scott
IL SWCD Chapter Secretary



International Association of Administrative Professionals®



Chapter Number: 102365

Chapter Name: Illinois SWCD

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IAAP – IL SWCD CHAPTER ANNUAL REPORT

The IL SWCD Chapter of IAAP is having an exciting year and is benefiting its members by offering interesting programs and informative workshops at each meeting. Our chapter meets quarterly for a day meeting in Springfield, the most central location for our members from all over the state of Illinois.

The July meeting included installation of new officers and a program on Records Retention given by the Records Management Supervisor of the Illinois Secretary of State's office, State Archives Division. All SWCD's are considered state entities and therefore must adhere to rules of records retention.

The October meeting began a new segment of our meetings, the group activity. This meeting's activity focused on grammar and writing skills. The afternoon program, which qualified for recertification points for our certified members, was on Computer Security at Home. Plans were made for a chapter basket raffle at an upcoming conference.

The chapter secured a booth at the Association of IL SWCD Employee's Association conference held in December, where a laptop computer continuously played an IAAP recruitment video. Members were present to hand out informative brochures and answer questions about IAAP and our chapter. We also conducted the basket raffle, which netted our chapter over \$600. The general session at this conference was sponsored by our chapter and was a big hit with all those present. A professor from Lincoln Land Community College delivered a lively presentation on workplace conflict.

The January meeting is time for the annual potluck. Our group activity for this meeting, Business Dining Etiquette, was held during the lunchtime meal, and was conducted by an educator from the University of Illinois Extension Service. The afternoon program was a session on Women's Self Defense Tactics and Crime Prevention. Officers and two instructors from the Sangamon Co. Sheriff's Office, Crime Prevention Division, presented a hands-on program that involved learning ways of preventing an attack and how to release a hold on us placed by an attacker. It focused on several tips to remain safe while traveling, both in hotels and public transportation.

The upcoming April meeting will be a celebration of Administrative Professional's Day. The group activity will be listening skills, and the afternoon program will be delivered by an attorney specializing in estate planning. The Avery Chapter Call Program has donated sample packs for all members present at this meeting. To commemorate Administrative Professional's Week, the chapter will conduct a raffle, with the winner receiving a laptop computer.

The July meeting will focus on "Netiquette" for the group activity and the afternoon program will be conducted by a dietician from St. John's Hospital on enhancing brain activity by the foods we consume. We also will finalize plans for another conference held at the end of July, sponsored by the Illinois Department of Agriculture, where we will again provide a booth to promote our chapter, and sponsor a session on Microsoft Publisher.

This year has been very beneficial for our members, some of whom travel a great distance to the quarterly meetings. The goal of all of our chapter meetings is to make the meeting "worth the trip."

Bonita Schone
IL SWCD President



CONGRATULATIONS DEE AGANS!!

Dee is the winner of the first-ever, IAAP SWCD Chapter Administrative Professionals Day Raffle. She won a Dell Laptop Computer. The raffle was a huge success for the chapter, helping to raise funds for professional and educational development for SWCD employees.

Newsletter Editor—Melissa Caudle, 217-532-3610, x. 3

Newsletter Web Master—Jill Brammeier, 618-526-7919, x.3

THANKS TO ALL
THOSE WHO
CONTRIBUTED TO OUR
NEWSLETTER!!

Office manners matter: 5 quick techniques for greater success

Spring is finally here – with its rich promise for a great year ahead and a reminder that we can always “renew” ourselves in the same way as Mother Nature.

Now more than ever, the ways you present yourself and promote your professionalism determine how high you’ll rise – whether in your organization or to new positions of greater responsibility. Employees who take care to use outstanding office manners and appear “polished” are simply more likely to be successful than their less careful counterparts.

Below are the top five techniques that can help you earn even greater recognition, respect and rewards in the workplace when practiced regularly:

Stand to welcome visitors or guests entering your workspace. Likewise, stand if you’re being introduced to someone for the first time.

Shake hands like you mean it – heartily, not in a wimpy way. Your handshake is an extension of your enthusiasm when meeting or seeing someone. Also: remember that either a man or woman may initiate a handshake.

Introduce higher-ranking people first. For instance, if you are approaching an executive with a new employee, begin by addressing the executive: “Ms. Y, allow me to introduce our new employee...”

Always reply to any invitation noted “RSVP.” Contrary to popular belief, this French abbreviation requests a response, regardless of whether you expect to attend or not.

Answer correspondence in a timely fashion - within 24 hours whenever possible. And make a special effort to handle complaints or concerns right away, nipping them in the bud and helping to avoid miscommunications that can make situations harder to resolve.

Using these stellar office manners is a great way to promote your continuing success each and every day!

Joan Burge, CEO and founder of Office Dynamics