



**Our mission is to create a pipeline of future Kansas bankers and enhance the image of the Kansas banking industry.**

In 1999, the Kansas Bankers Association (KBA) established the Kansas Bankers Educational Foundation (KBEF) with the goal of educating those interested in pursuing a career in the banking industry and to help educate non bankers about the important role banks play in their communities. To accomplish these goals, KBEF has established its mission and objectives as follows:



## **1. ENHANCE THE KANSAS BANKING INDUSTRY'S IMAGE**

- Create a Kansas Banking Brand that showcases the positive role banks play in their communities.
- Develop a comprehensive media plan, featuring digital advertising and social media to highlight bank activities in their communities.



## **2. IMPLEMENT A WORKFORCE DEVELOPMENT STRATEGY TO ATTRACT THE NEXT GENERATION OF BANKING PROFESSIONALS**

- Enhance scholarship offerings to students pursuing banking-related careers.
- Provide guidance to banks wishing to develop or improve internship programs.
- Create a ready-made Workforce Development Tool Kit for banks to use, which includes:
  - » Video ads that banks could re-brand as their own;
  - » Digital and social media postings banks could re-brand as their own;
  - » Resources on the KBA Website; and
  - » Promoting the use of in-person and online banking courses available throughout the state.



## **3. ESTABLISH BANKER SUPPORTED SPONSORSHIP, SCHOLARSHIP AND ENDOWMENT OPPORTUNITIES**

- Support the roles of the KBEF Director and Ambassador to highlight giving opportunities for Kansas bankers.
- Enhance the opportunities for giving to KBEF including:
  - » KBEF Legacy Club
  - » Scholarship Endowments
  - » BLOK Cornerstone Club



## **4. PROMOTE FINANCIAL LITERACY**

- Define the role of and dedicate staff resources to financial literacy education.
- Determine the financial literacy tools available to help educate the public.
- Seek other opportunities for collaboration with other financial literacy partners.

### **CONSIDER A CONTRIBUTION TODAY!**

Supporting KBEF is one thoughtful way to honor or memorialize a loved one or special event. Gift planning can maximize benefits to you, the foundation, and beneficiaries. Our staff is always happy to visit with you to help fulfill your giving objectives.

Contributions to KBEF may be made by an individual gift, corporate gift, bequest or through a memorial gift. Contributions may be earmarked for scholarship, sponsorship or endowment use.



## LEGACY CLUB PRIORITIES

- Ensure top quality educational programming for the long-term benefit of Kansas bankers.
- Promote the image of banking to advance the knowledge of its importance statewide.
- Enhance the financial literacy skill-set of all Kansans.

## RECOGNITION LEVELS

\$1 Million +

\$500,000 - \$999,999	\$50,000 - \$99,999
\$250,000 - \$499,999	\$25,000 - \$49,999
\$100,000 - \$249,999	\$10,000 - \$24,999

A few examples of planned giving strategies are listed below.

GIFT TYPE	YOUR GOAL	BENEFITS	HOW TO GIVE IT
Bequest	Defer a gift until after your passing	-Lifetime control of your estate -Estate tax exemption -Provide for heirs while supporting KBEF	Name KBEF in your will
Living Trust	Make a gift while preserving estate for your heirs	-Control of trust during your lifetime -Estate-tax savings	Name KBEF as a living trust beneficiary
Charitable Remainder Annuity Trust	Secure a fixed income during your lifetime	-Immediate income tax deduction -Lifetime fixed income -No capital gains tax -Possible estate tax savings	Create a trust that pays you a fixed amount annually with the remainder benefitting KBEF
Charitable Remainder Unitrust	Protect against longterm effects of inflation	-Immediate income-tax deduction -Lifetime variable income -No capital gains tax -Possible estate tax savings	Create a trust that pays you a percentage of its assets with the remainder benefitting KBEF
Charitable Gift Annuity	Receive fixed annual payments	-Immediate income-tax deduction -Fixed annual payments for life -Future tax savings	Form a contract in which you receive fixed annual payments with the remainder benefitting KBEF
Charitable Lead Trust	Reduce taxes on assets left to heirs	-Decrease size of taxable estate -Avoid large gift taxes -Support KBEF while preserving trust for heirs	Create a trust that pays KBEF yearly, then passes assets to your heirs
Life Insurance Gift	Make a significant gift without a large cash outlay	-Current income tax deduction -Possible future tax savings	Name KBEF as your plan beneficiary
Retirement Plan Gift	Avoid double taxation on retirement plan assets	-Preserve plan value -Avoid income tax and possible estate tax	Name KBEF as your plan beneficiary
Real Estate Gift	Avoid capital gains tax on home or property sale	-Immediate income tax deduction -Avoid capital gains tax	Donate property to KBEF
Retained Life Estate	Donate your property but continue to live there	-Income tax deduction -Continue use of home/property	Live in your home and give ownership to KBEF after your passing
Retirement Plan Distribution	Direct your required minimum distribution to KBEF	-Income tax deduction	Make your distribution payable to KBEF



**Kansas Bankers  
Educational Foundation**

# SCHOLARSHIP ENDOWMENT OPPORTUNITIES

## STUDENTS ENROLLED IN HIGHER EDUCATION BANKING PROGRAMS

Currently, KBEF scholarship funds are awarded to Kansas students enrolled in each of the following programs due to their strong focus on banking: The Robbins Banking Institute at Fort Hays State University and the Thompson Center for Integrity in Finance and Economics Banking Minor Program at Benedictine College. KBEF also awards scholarships to children of Kansas bankers with an emphasis on those pursuing a career in banking.

KBEF is looking to increase those scholarships and expand to other higher education institutions through dedicated donations by individual gifts, corporate gifts, bequests or memorial gifts. KBEF is also looking at setting up dedicated scholarship endowments that will live on past the initial gift to the foundation. Endowing a scholarship is a great way to honor or memorialize an institution, banker or family while helping the next generation of banking professionals.

A gift of \$25,000 or more is needed to endow a scholarship in perpetuity. Your endowment will live on and the recipient of your scholarship will be annually recognized in *The Kansas Banker* magazine, KBEF annual report and other KBA communications. You will also be recognized as a member of the KBEF Legacy Club.



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# BANK LEADERS OF KANSAS CORNERSTONE CLUB

The Bank Leaders of Kansas (BLOK) Program is a leadership development program created by the Kansas Bankers Association in 2006 and has trained more than 200 Kansas bankers. The BLOK program is designed to improve the leadership skills of Kansas bankers and accomplishes that goal through four primary objectives:

- To increase the individual banker's understanding and knowledge of the structure and governance of KBA; including a complete overview of programs, services, and representation provided by KBA.
- To increase the individual banker's understanding of the state and federal legislative process and increase their willingness to actively support and defend the Kansas banking industry.
- To increase the individual banker's understanding and awareness of the various state and federal agencies that govern the banking industry in Kansas and how those agencies interact with KBA.
- To improve the individual banker's leadership and communication skills through professional development and leadership training sessions, and to provide a clear understanding of the individual banker's role as a volunteer KBA leader.

The BLOK Cornerstone Club will recognize individual and corporate gifts, dedicated entirely or in part to the continued advancement of the state's premier bank leadership program. A gift of \$25,000 or more is needed to be recognized as a member of the BLOK Cornerstone Club. Your gift will be recognized throughout the year in *The Kansas Banker* magazine, KBEF annual report and other KBA communications. You will also be recognized as a member of the KBEF Legacy Club.



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## CONTACT INFO



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**"KBEF provides us with a unique opportunity to give back by investing in future bank leaders. Identifying, attracting and educating bankers is paramount to the continued success of our industry. With adequate resources, we believe KBEF can make a difference."**

*-Joe and Becky Tongish*

