

John A. House, ChFC

Charitable Planning Specialist

With over twenty five years of experience in the financial services industry, John House specializes in money management and advanced estate and tax-exempt planning.

John is a Senior Associate Advisor for the Swenson Anderson Financial Group, a Minnesota Registered Investment Advisory firm and a Registered Representative of Financial Network Investment Corporation, member SIPC.

He is licensed in 15 states and shares his experience through private appointments, seminars and special engagements nationwide.

John is a member (graduate) of the American Society for Chartered Financial Consultants (ChFC), the Planned Giving Roundtable (PGR), Central Arizona Estate Planning Council (CAEPC), the National Association of Insurance and Financial Advisors (NAIFA), the Family Firm Institute (FFI), and The Financial Planning Association.

Swenson Anderson Financial Group (SAFG)

John's Regional Support Firm in the National Planned Giving Advisory Council is Swenson Anderson Financial Group located in Minnesota. SAFG helps provide the strategic support, through a "team approach" that leads to well-informed decision making in the following areas:

- Philanthropic Planning
- Business Continuity Planning
- Professional Asset Management
- Insurance Analysis
- Income Tax Planning
- Estate Planning
- Corporate Fringe Benefits
- Asset Protection Planning

The adoption of individually tailored innovative planning strategies is predicated upon a careful and thorough analysis of each client's values and planning objectives.

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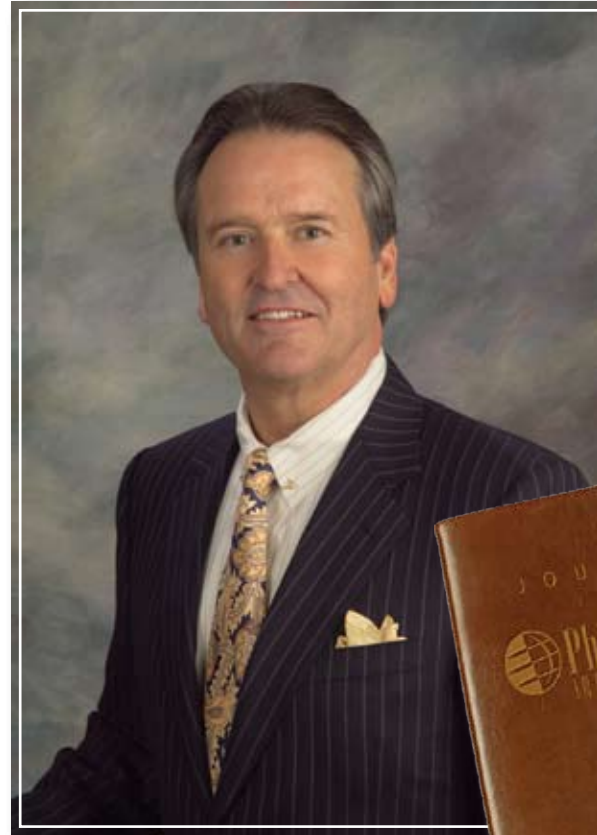
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Please note: Coyote Financial, Swenson Anderson Financial Group, Financial Network Investment Corporation, and Philanthropy International are non-affiliated.



Investment advisory services and securities offered exclusively through Ameritas Investment Corp. ("AIC"), member NASD/SIPC. AIC is not affiliated with Five Point Financial

YOUR CHARITABLE PLANNING SPECIALIST



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WHAT IS A CHARITABLE PLANNING SPECIALIST?

A Charitable Planning Specialist is a professional advisor with a passion for charitable causes. They desire the greater good and have dedicated a portion of their business to serving as a volunteer planned giving officer for charitable organizations. They are philanthropic in nature and have extensive experience in charitable and estate planning.

BEING PART OF THE NATIONAL CHARITY ADVISORY COUNCIL



When considering the application of any financial planning strategy, it is important to select professional advisors that have specific training in the area of concern. Planned Giving is no different. While this field is not new, it is still unique and requires an educational commitment from the advisors that intend to offer advice related to specific planning strategies.

Philanthropy International has worked to identify a National Charity Advisory Council of professional advisors who are familiar with various tax-saving techniques.

Each Charitable Planning Specialist is required to demonstrate an on-going commitment to education in advanced charitable planning and strict adherence to the highest of ethical standards. While we do not endorse or recommend one advisor over another, we hope that you will consider allowing our local Charitable Planning Specialist the opportunity to give you more information on how you might benefit from an individually tailored planned gift.

As a part of this national council, the Charitable Planning Specialist is also prepared to collaborate with any current or past advisors with whom you are already working. You will not be obligated to direct any type of gift toward the presenting charity, or even to work with the Charitable Planning Specialist, by agreeing to have a discussion about your financial needs.

Disclaimer: The purpose of this presentation is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. The tax deductibility of a gift discussed in the program/publication is dependent on the Applicable Federal Rate (i.e. charitable gift annuities, unitrusts, etc.). Tax deductions vary based on applicable federal discount rates, which are published on a monthly basis.

BECOMING A CHARITABLE PLANNING SPECIALIST

Each Charitable Planning Specialist must first be nominated by their Regional Support Firm, a Financial Advising firm. Once the nomination is submitted, the Philanthropy International leadership must also accept their nomination. They then begin an educational track to learn more about the intricacies of advanced charitable and estate planning, as well as how to implement a marketing strategy for a local charity.

The Regional Support Firm leadership manages the Charitable Planning Specialist, working with the Philanthropy International leadership to ensure quality service.

ABOUT PHILANTHROPY INTERNATIONAL

Philanthropy International is a unique community foundation that has a national mission to build stronger communities and secure lasting family legacies. They provide planned giving support and resources to a variety of charities and causes, including the March of Dimes.

The Charitable Planning Specialist, partnering with Philanthropy International, works directly with donors and their advisors, providing prudent and confidential consultation to help meet the donor's financial goals. The result is a gift that allows the donor to preserve their wealth for the benefit of heirs; while converting tax dollars into benefit for their favorite charities.

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