Tiffany House, CAP®

Tiffany House is a financial advisor dedicated to Charitable Planning and helping her clients create a MasterGame Plan™ that incorporates their intellectual, ethical and financial legacy. She is passionate about educating women on financial matters to help them create a legacy of their own design and steward wealth to future generations while considering civic responsibility.

Tiffany is the Vice President/Partner of her family's business, MasterTech Financial Advisors, Inc., and has worked in the financial services industry for fifteen years. She is Series 7, Series 66 and Insurance Licensed and has achieved her Chartered Advisor in Philanthropy (CAP®).

Tiffany was an Environmental Science Major at the University of Arizona and enjoyed a NASA Grant Internship working on documentation of Global Climate Change. After college, she became a co-owner and operator of The Koocanusa Resort in Montana. She is also a co-founder of Beyond the Ask, a company that helps non-profit organizations fundraise.

Unique Specialty Areas:

- Charitable Gift Planning
- Tax Advantaged Planning
- Financial Planning for Women who want to Leave a Legacy
- Business and Personal Planning for Entrepreneurs
- Business Transition and Succession Planning
- Asset Protection and Risk Management
- Alternatives to Long Term Care Insurance
- Charitable Trust
- Donor Advised Funds

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Tiffany T. House, CAP®

Tiffany enjoys public speaking as a way to educate individuals and organizations about the win-win outcome of planned giving, creating a MasterGame Plan™ for life, and empowering people to create a legacy of their own design. She is honored to mentor charitable organizations and provide enhanced knowledge through her speaking engagements.

Community & Professional Involvement:

Planned Giving Round Table of Arizona (PGRT) - Vice President, Annual Conference Chair

AT Still University Women In Philanthropy— Board Member

Southwest Autism Research & Resource Center (SARRC)—Advisory Board Member

Feeding Matters—Advisory Board Member

YWCA—Advisory Board Member

ValleyLife—Advisory Board Member

Arizona State University Women & Philanthropy and Partners in Philanthropy—Member

Arizona State University Presidents Club Young Leaders Program—Co-Chair

International Association of Advisors in Philanthropy (AIP) - Member

EO Accelerator—Member

Ellevate Women's Group – Member

Central Arizona Estate Planning Council (CAEPC)—Member

Landmark Curriculum for Life Graduate

Scottsdale Leadership Class 31

Upcoming and Recent Speaking Engagements:

Non-Profit Learning Lab, May 2017

- Planned Giving Tools to Transform Donor Conversations

Habitat for Humanity, March 2017

- Maximizing the Impact of Your Charitable Giving

Hunter Hagan & Company CPA Firm; December 2016

- Tax Advantaged Charitable Planning Tools

Boys and Girls Club of Metro Phoenix, December 2016

- Charitable Planning Tools for Donors

Planned Giving Round Table of Arizona; October 2016

- Planned Giving Tools, Prospects for Each, and Who Should be at the Table

Various Workshops Hosted by MasterTech Financial

- What a 1031 Exchange Won't Do
- Women and Investing
- Alternatives to Long Term Care
- Asset Protection Strategies

Presentation Topics

Charitable Planning Tools

Tiffany provides an overview and graphic explanation of Charitable Planning Tools for donors, non-profit professionals or professional advisors. Donors will be taught what gifts are best to give for their situation, how to maximize tax deductions and create win-win outcomes. Non-profit professionals will learn how to incorporate Planned Giving into any donor conversation. Advisors will leave with an understanding that the charitable conversation can lead to more vibrant relationships with their clients.

Presentation Topics:

- Planned Giving Tools to Transform Donor Conversations
- Efficient Giving –Charitable Tools to Create Win-Win Outcomes

The Above referenced topics can include the following tools:

Charitable Remainder Trust	Donor Advised Funds
Gift Annuities	Income in Respect to Decedent Assets
Life Insurance	Grantor Styled Charitable Lead Trust
Charitable Lead Trust	IRA Assets
Life Estates	

Audience:

- Donors, Board Members and Charitable Supporters
- Business Owners
- Owners of Highly Appreciated Real Estate
- Professional Advisors
  - Tax
  - Legal
  - Financial
- Charitable Representatives
  - Executive Staff
  - Board Members
  - Development / Planned Giving Officers

Donor Advised Funds

Learn the many ways that Donor Advised Funds can be used to teach philanthropy, bring a family closer together and make other Planned Giving Tools more attractive.

Presentation Topics:

- Expand Philanthropy with Donor Advised Funds
- Innovative uses of a Donor Advised Fund

Audience:

- Professional Advisors
  - Tax
  - Legal
  - Financial
- Charitable Representatives
- Donors, Board Members and Supporters

Charitable Remainder Trusts

A Charitable Remainder Trust allows you to sell an appreciated asset and keep the money that would have gone for taxes growing (tax-free), in the Trust with the goal of having more lifetime income, tax free compounding, and a meaningful charitable legacy! On top of that, you receive an income tax deduction now for your future gift, reduce potential estate taxes, and accomplish asset protection! Win–Win-Win

Presentation topics:

- Charitable Remainder Trust Strategies and Stories
- Tax Efficient Business Sale
- What a 1031 Exchange Won't Do
    - Sell highly appreciated real estate tax-free
- Fund a Roth IRA Conversion with a Charitable Trust

Audience:

- Donors, Board Members and Charitable Supporters
- Business Owners
- Owners of Highly Appreciated Real Estate
- Professional Advisors
    - Tax
    - Legal
    - Financial
- Charitable Representatives
    - Executive Staff
    - Board Members
    - Development / Planned Giving Officers

Charitable Lead Trusts

Charitable Lead Trusts are an excellent yet underutilized opportunity especially today with the low AFR (7020) Rates! Learn how they work and the best practices when using a Lead Trust.

Presentation Topics:

- Personal Endowments with Charitable Lead Trusts
- When to use Grantor, Non-Grantor and Super Charitable Lead Trusts

Audience:

- Professional Advisors
    - Tax
    - Legal
    - Financial
- Charitable Representatives
    - Executive Staff
    - Board Members
    - Development / Planned Giving Officers
- Donors, Board Members and Charitable Supporters

Women and Legacy Planning

Over 70% of our nation's wealth will be transferred to the next generation by women. However, many women do not feel empowered about their finances or the legacy they want to leave.

Presentation Topics:

- Women and Investing
- Leaving a Legacy of your own Design
- Long Term Care Impacts on Women
- How to incorporate an Ethical Will into your Legacy

Entrepreneurs

Business Owners face unique challenges and complex issues. We help owners sleep well knowing that their business and personal planning needs can be integrated with a MasterGame Plan.

Presentation Topics:

- Business Transition
- Tax Advantaged Planning
- Power of Tax Free Compounding
- Asset Protection Planning
- Retirement Planning

Financial Planning

At MasterTech Financial, we help our clients create a MasterGame Plan that incorporates their goals and objectives to create a legacy of their own design.

Presentation Topics:

- Power of Tax Free Compounding
- Asset Protection Planning
- Roth IRA – The Best Asset for Grandkids
- How to use an Ethical Will
- Estate Tax Planning
- Retirement Planning
- Tax Advantaged Planning

Alternative to Traditional Long Term Care Insurance

Life expectancy for all Americans has increased significantly, making long term care needs a reality for many, especially women. 70% of all 65 year-old people will need Long Term Care at some point in their life and 75% of nursing home residents are women. Traditional Long Term Care Insurance premiums are wasted if you don't get sick. There are alternatives that can help you leave a legacy and reduce your risk!

Presentation Topics:

- Alternatives to Long Term Care
- The Unique Impact of Long Term Care on Women