

## INSIDE

- 2 Legal Education for Students
- 3 Support Your Foundation
- 4 Scholarship for Fellows

## ACTEC FOUNDATION BOARD

### President

Martin Hall  
Boston, Massachusetts

William P. LaPiana  
New York, New York

Laird A. Lile  
Naples, Florida

### Vice President

L. Henry Gissel Jr.  
Houston, Texas

James M. Maddox  
Hobbs, New Mexico

C. Kevin McCrindle  
Waterloo, Iowa

### Treasurer

John A. Terrill II  
West Conshohocken,  
Pennsylvania

Judith W. McCue  
Evanston, Illinois

Peter T. Mott  
Southport, Connecticut

### Secretary

Stephen R. Akers  
Dallas, Texas

Barry A. Nelson  
Aventura, Florida

Elaine M. Bucher  
West Palm Beach,  
Florida

Cynda C. Ottaway  
Oklahoma City, Oklahoma

John T. Rogers Jr.  
Los Angeles, California

Henry Christensen III  
New York, New York

Joshua S. Rubenstein  
New York, New York

C. Fred Daniels  
Birmingham, Alabama

Margaret E.W. Sager  
West Conshohocken,  
Pennsylvania

Mickey Davis  
Houston, Texas

Kurt A. Sommer  
Santa Fe, New Mexico

P. Daniel Donohue  
Sioux Falls, South  
Dakota

James D. Spratt Jr.  
Atlanta, Georgia

David M. English  
Columbia, Missouri

Bruce Stone  
Coral Gables, Florida

Charles D. Fox, IV  
Charlottesville Virginia

Robert E. Temmerman,  
Jr. San Jose, California

Lynne K. Green  
Jackson, Mississippi

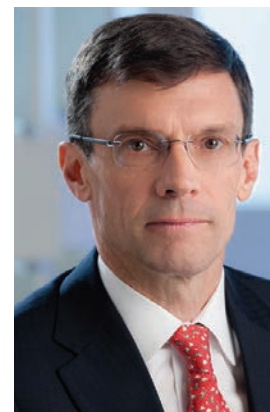
Margaret Van Houten  
Des Moines, Iowa

Susan T. House  
Pasadena, California

Richard D. Woods  
Overland Park, Kansas

Cynthia G. Lamar-Hart  
Birmingham, Alabama

## President's Message



As my tenure as President of the American College of Trust and Estate Counsel (ACTEC) Foundation comes to a close, I welcome this opportunity to offer my sincere thanks to all of the supporters of the Foundation and to my fellow directors. Your generosity, dedication and hard work have sustained and will advance the mission of the ACTEC Foundation to promote scholarship and foster education in trust, estate and tax law. In our most recent fiscal year, the Foundation has supported many activities, including the following:

- It has funded the production of the first two videos in the ACTEC Family Estate Planning Guide and has agreed to fund further episodes in the series.
- When ACTEC welcomed the second class of ACTEC Young Leaders in September 2016, the Foundation in turn continued its support of the program and also hosted a Young Leaders reception last fall in Boston.
- The Foundation's Mary Moers Wenig Student Writing Competition continues to attract thoughtful papers. This year's first place winner – *A Nominal Credit: Why Donor Recognition Should Not Limit the Deductibility of Section 170 Charitable Contributions* – was submitted by Benjamin Joseph Imdieke of the University of Michigan Law School.
- The Foundation has underwritten ACTEC's next Academic Symposium – "Wealth Transfer Law in Comparative and International Perspective" – to be held on September 8, 2017, at the University of Iowa.
- The Foundation continues to provide support to the ACTEC Law Journal Student Editorial Board at Hofstra University, and publishes the work-product of the College, including the Fifth Edition of the Commentaries.
- Thanks to an ACTEC Foundation grant, ACTEC Fellows receive complimentary access to the Wills, Trusts, and Estates Law eJournal within the SSRN (Social Science Research Network).

Please drop by the ACTEC Foundation booth located near the Registration Desk if you are attending the Annual Meeting. Foundation Directors will be on hand to answer your questions and explain more fully our valuable work.

And please come by on March 9 at 6:30 p.m. to the Silent Auction reception with your check book or credit card in hand. There are many wonderful lots to be bid on and critical support to be provided for our future activities!

Sincerely,

Martin Hall  
President, ACTEC Foundation

## ACTEC Young Leaders Program

In September 2016, we welcomed the second class of ACTEC Young Leaders - Marissa Dungey, Chasity Sharp Grice, Toni- Ann Kruse, Jonathan Lee and Raj Malviya.

The Young Leaders Program was developed to promote diversity and inclusivity in the trust and estate bar and to foster development of new leaders in our profession. It builds on the leadership program developed by the RPTE Section of the American Bar Association, and provides two further years of professional development support and mentoring to those who have completed the RPTE fellowship program.

Working closely with the ACTEC Diversity and Inclusivity Committee, and the many Fellows of the College who have agreed to serve as mentors, the Foundation has been honored to provide its support to this important program. That support was continued by a further grant approval made at the fall meeting.

## ACTEC Family Estate Planning Guide



Last summer, the Foundation funded two educational videos - "Understanding Powers of Attorney," by Bernie Krooks, and "What is a Revocable Trust and Do I Need One?" by Mary Radford. Following their success, the Foundation approved at the Fall Meeting a second grant request from the ACTEC Communications Committee to underwrite the production of additional episodes in a video series that will comprise the ACTEC Family Estate Planning Guide. The guide is designed to provide a valuable educational resource that encourages estate planning for families of any means.

The Krooks and Radford videos are both available on the ACTEC website and more generally on YouTube and other social media outlets.

## 2017 - 2018 ACTEC FOUNDATION OFFICERS AND DIRECTORS

### Officers

- L. Henry Gissel, Jr. (Houston, TX), President
- James M. Maddox (Hobbs, NM), Vice President
- James D. Spratt, Jr. (Atlanta, GA), Treasurer
- Judith W. McCue (Chicago, IL), Secretary

### Directors

- Susan L. Abbott (Boston, MA)
- Stephen R. Akers (Dallas, TX)
- Elaine M. Bucher (West Palm Beach, FL)
- Ann B. Burns (Minneapolis, MN)
- Stephanie B. Casteel (Atlanta, GA)
- Henry Christensen, III (New York, NY)
- Mickey R. Davis (Houston, TX)
- P. Daniel Donohue (Sioux Falls, SD)
- Erik Dryburgh (San Francisco, CA)
- David M. English (Columbia, MO)
- Charles D. Fox, IV (Charlottesville, VA)
- Susan N. Gary (Eugene, OR)
- Lynne K. Green (Jackson, MS)
- Susan T. House (Pasadena, CA)
- Cynthia G. Lamar-Hart (Birmingham, AL)
- William P. LaPiana (New York, NY)
- C. Kevin McCrindle (Waterloo, IA)
- Peter T. Mott (Southport, CT)
- Barry A. Nelson (Aventura, FL)
- Cynda C. Ottaway (Oklahoma City, OK)
- John T. Rogers, Jr. (Los Angeles, CA)
- Joshua S. Rubenstein (New York, NY)
- Margaret E.W. Sager (West Conshohocken, PA)
- Robert E. Temmerman, Jr. (San Jose, CA)
- John A. Terrill, II (West Conshohocken, PA)
- Margaret Van Houten (Des Moines, IA)
- Richard D. Woods (Overland Park, KS)

Subject to approval at the Annual Business Meeting on Friday, March 10, 2017, at The Phoenician, Scottsdale, Arizona.

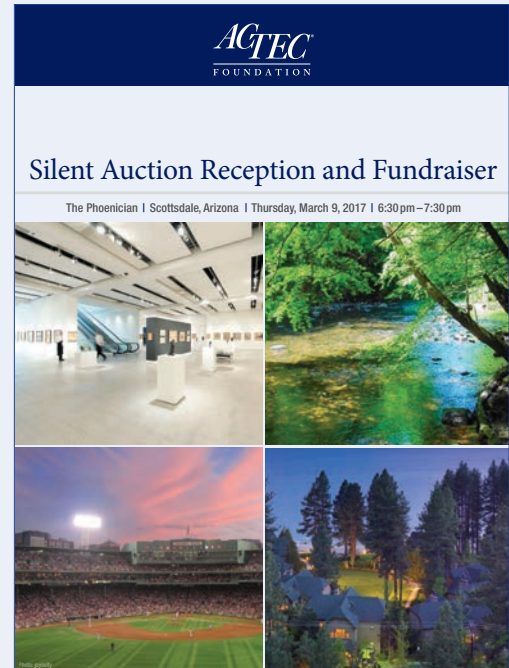
## 2017 Annual Meeting Silent Auction Reception and Fundraiser

The ACTEC Foundation's 2017 Silent Auction Reception will be held on Thursday, March 9, 2017, at 6:30pm in the Jokake Inn during the Annual Meeting at The Phoenician in Scottsdale, Arizona.

This year's auction items include a wide array of fine dining options in major cities across the country, behind-the-scenes arts and entertainment experiences, stays in luxury resorts and private homes, and sports outings to suit every interest.

I would like to thank the many Fellows, sponsors, business partners, and friends who have donated auction items this year. The Auction is a critical component of the Foundation's fundraising program and your participation and generosity are essential to making it a great success.

We look forward to seeing you in Arizona at our Thursday evening Reception. Bid high and often. Good luck to all and thank you for your support!



## Fall 2017 Bike Ride Fundraiser - Bike the Natchez Trace Parkway



Join our ACTEC Foundation fall 2017 cycling fundraiser for an exciting ride along the nation's longest dedicated bike path.

The Natchez Trace Parkway is a two-lane, 444-mile paved roadway that crosses Mississippi, Alabama and Tennessee. There are no stop-signs or traffic lights; there is a wide shoulder to ride on; no commercial traffic is allowed; and

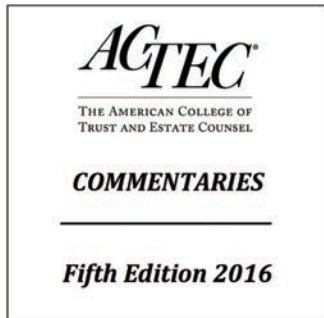
the vehicle speed limit is 50 mph or lower. In sum, the route is as safe as a bike route can be. It is also reasonably flat and renowned for its beautiful and varied scenery and 95 historical and natural "sights to see".

This tour was designed so that participants can choose to ride at their own pace. Each day will have a choice of segments at varying lengths: 20-30 miles; 40-50 miles; and 60-75 miles. The ride will be supported by a professional tour operator who will coordinate logistics, make all lodging arrangements, and provide all meals, including picnic lunches along the route. Two companion vans will also provide on-road support, to ensure that each cyclist has sufficient water, snacks, and mechanical support, as well as a place to rest or stop riding before the end of the day's route.

Cyclists will arrive in Natchez on October 12, 2017, start riding on October 13, and arrive at the Omni Hotel in Nashville on October 19, 2017, in time for the beginning of the Fall Meeting.

For more information, contact the bike ride organizers John Hartog (jahartog127@gmail.com), Margaret Hand (mmhand@hbh.law) or Robert Temmerman (bobtemm@gmail.com).

## ACTEC Commentaries



The ACTEC Foundation has been proud to support financially the editorial development and publication of the ACTEC Commentaries on the Model Rules of Professional Conduct (MRPC) for many years.

The updated 5th Edition is available to access online at

<http://www.actec.org/publications/commentaries/>. Print copies may also be requested

New material in the commentaries covers six areas, including advertising, delegation of work to non-lawyers, multi-state practices, and imputation of conflicts of interest.

Existing Commentaries have been expanded to address recent developments, including FATF and elder abuse statutes. The Foundation wishes to acknowledge the contributions of ACTEC Fellows Karen E. Boxx (WA), Christopher H. Gadsden (PA), Peter T. Mott (CT), and John T. Rogers, Jr. (CA) in bringing the 5th Edition to its successful conclusion.

## How to Contribute

The ACTEC Foundation is committed to promoting scholarship and education in trust, estate, and tax law. The ACTEC Foundation funds trust and estate programs and activities that serve those who are at risk and underserved. Your contribution is tax-deductible.

Please join your colleagues in supporting The ACTEC Foundation through one or more of the following methods:

**Annual Membership Dues** – When remitting dues, consider adding an annual contribution to The ACTEC Foundation.

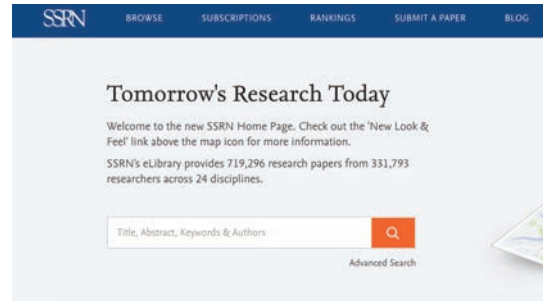
**Securities Donations** – The ACTEC Foundation can accept your gift of securities. Contact Membership and Foundation Management Director, Amy Michaud, at [Amy.Michaud@actec.org](mailto:Amy.Michaud@actec.org).

**In Memoriam Tribute** – Honor a colleague, friend, or loved one with a memorial gift to The ACTEC Foundation.

**Matching Gifts** – Your firm or company may “match” your donation to The ACTEC Foundation. Please check your firm’s benefits administrator for more information.

**Online** – Making an online contribution is simple, secure, and cost-efficient. Visit <http://actecfoundation.org/how-to-contribute/online-contribution-form/>

## SSRN eJournal



ACTEC Fellows have complimentary access to the Social Science Research Network (SSRN), a worldwide collaborative of over 330,600 authors and more than 2.2 million users devoted to the rapid dissemination of research. The Wills, Trusts & Estates eJournal/SSRN, edited by ACTEC Fellow and Harvard Law School Professor Robert H. Sitkoff and sponsored by the ACTEC Foundation, distributes abstracts of papers dealing with issues concerning wills, trusts, and estates and related tax subjects).

To register for your free subscription, visit <https://hq.ssrn.com/login/pubSignInJoin.cfm?>, under “New Members” enter your email address, click “Join SSRN”, complete “SSRN User HQ Membership” and enter “Create Account”. You will receive an email “Please activate your SSRN account”.

## ACTEC FOUNDATION STAFF

### Executive Director

Deborah O. McKinnon

### Membership and Foundation Management Director

Amy Michaud

[amy.michaud@actec.org](mailto:amy.michaud@actec.org)

(202) 684-8453

### Communications Director

Leah Weatherspoon

[lweatherspoon@actec.org](mailto:lweatherspoon@actec.org)

(202) 688-0271

### Finance Director

Brendan McGinn

[brendan.mcginn@actec.org](mailto:brendan.mcginn@actec.org)

(202) 688-0270

### ACTEC Foundation – National Office

901 15th Street NW, Suite 525

Washington, D.C. 20005

To learn more, visit:

[www.actecfoundation.org](http://www.actecfoundation.org)