

INSIDE

- 2** Foundation Fundamentals
- 3** Scholarship For Fellows
- 4** How to Support Your Foundation

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President's Message

ACTEC Fellows and other attendees of the 2015 Annual Meeting, please join me in thanking the ACTEC Foundation Board of Directors for their many contributions to another successful year of foundation activity.

The Foundation Board is asked to consider many worthwhile funding proposals. There are two approved grants that I would like to highlight. As outlined more fully later in this newsletter, the Board made a new grant in November 2014 to the National Judicial College to complete the funding of an innovative project – *Probate Matters: Education for Judicial Officers* – designed to train probate court judges and other personnel on the National Probate Court Standards and other fundamental probate issues. And, working closely with ACTEC's Legal Education Committee, last summer the Board provided the funding for the next academic symposium entitled *The Centennial of the Estate Tax: Perspectives and Recommendations*. These significant deliberations, which will review the current estate and gift tax laws, consider alternative systems and delve more fundamentally into the appropriateness of taxing wealth transmission, will be held on October 2, 2015, at Boston College Law School.

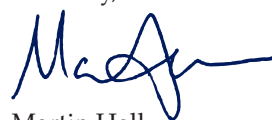
In addition to meting out funds, the Board plays a critical role in fundraising initiatives. As part of our annual campaign, board members contacted many of you as 2014 drew to a close. I am very pleased to report that we added a significant number of new contributors as a result of this outreach. I thank those new contributors and hope that they will join the ranks of our regular donors, to whom thanks as ever are extended for their continuing commitment to the Foundation.

We plan to finish this year in strong financial shape due in significant part to the upcoming Silent Auction. Details of the auction and reception – to be held on Saturday, March 7 – are in the final page of this newsletter. I would like to extend my thanks to those ACTEC Fellows and the many sponsors and friends of ACTEC who have contributed items for bid. I would also like to extend special thanks to the Board's Auction Committee members - L. Henry Gissel Jr., Joshua S. Rubenstein, Kurt A. Sommer, and Jeffrey C. Thede – for their tireless efforts in bringing this event to fruition. Remember, Bid Early, Bid Often and Bid High (particularly if you want a tax deduction).

If you would like to learn more about the Foundation, please drop by the Foundation booth located near the ACTEC Registration Desk. Foundation directors will be on hand to answer your questions during the breaks between the seminars and symposia on Thursday, Friday and Saturday mornings.

Thank you again for your support.

Sincerely,



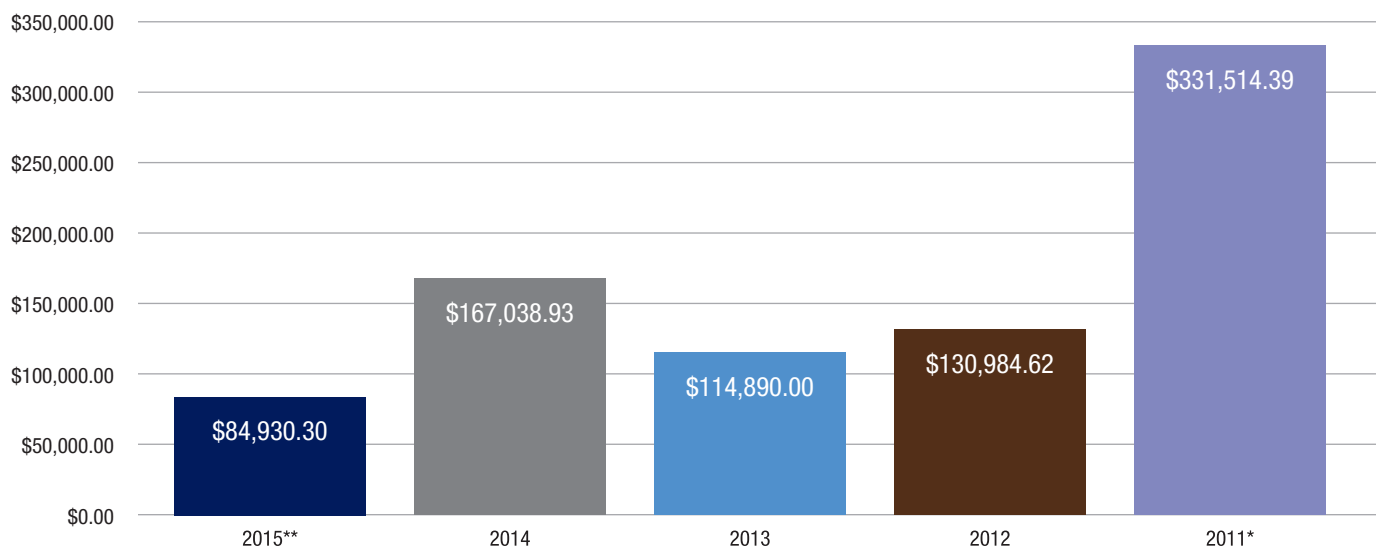
Martin Hall
President, ACTEC Foundation



Foundation Financials

The ACTEC Foundation is pleased to share the results of this year’s All College Campaign. Important resources for Fellows and programs and services that support legal students and the underserved would not be possible without the generous support of our repeat donors, the College’s leadership and first-time contributors. Please contact any Foundation Director to learn how you can help.

Foundation Contributions: 5-Year History



*2011 includes significant donations to the Lloyd Leva Plaine Memorial Fund.
 **2015 includes donations for the period May 1, 2014 through January 31, 2015 only.

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Subject to approval at the Annual Business Meeting on Thursday, March 5, 2015 at the Marco Island Marriott Beach Resort, Marco Island, Florida.

Grant Approved for National Judicial College

The ACTEC Foundation recently made a grant to the National Judicial College (NJC) to support the development of a web-based educational program for probate court judges and officials, especially those with minimal experience in trust and estate matters. The grant - \$18,000 – matched a grant made from the NJC's own Pillars of Justice fund, and underwrote the balance of the budget for the project.

The project – Probate Matters: Education for Judicial Officers – follows on from the recent publication by the National Center for State Courts and the National College of Probate Judges of *The National Probate Court Standards*, and is designed to educate judicial officers about those standards and effect their implementation. The intention is to produce a series of on-line web modules discussing fundamental probate issues, develop in-person and webcast presentations on critical and emerging probate topics, and offer a professional certification in probate competency to judicial officers. During the first year, it is expected that between 80-

120 probate adjudicators will benefit from the full array of educational programming.

For over 50 years, the NJC has been a leader in judicial education. The first to offer programs to judges nationwide, the NJC works with the judiciary to improve productivity, challenge current perceptions of justice and inspire judges to achieve judicial excellence. It draws participants from all 50 states and more than 120 countries. In 2013, nearly 500 judges received instruction through the NJC. An additional 4,000 judges and other court professionals received programming through nearly 50 web-based events.

Support for this initiative came from Fellow John Rogers and ACTEC President Kathy Sherby as part of the joint ACTEC/ National College of Probate Judges Task Force established by Duncan Osborne. ■



LLOYD LEVA PLAINE DISTINGUISHED LECTURE SERIES

The 2015 Lloyd Leva Plaine Distinguished Lecture was presented at the 49th Annual Philip E. Heckerling Institute on Estate Planning in Orlando, Florida. This year's LLP lecturer was David Cay Johnston. His presentation - *Crafting a 21st Century Estate and Gift Tax* - highlighted the transfer tax elements of a broader project to devise a modern tax code drawn on ancient principles of taxation. Johnston, a former investigative reporter who won a Pulitzer Prize while at The New York Times, teaches business, tax and property law of the ancient world at Syracuse University College of Law. He is the best-selling author of many books including *Perfectly Legal*, *Free Lunch* and *The Fine Print*, and is the editor of a new anthology, *Divided: The Perils of Our Growing Inequality*. ■

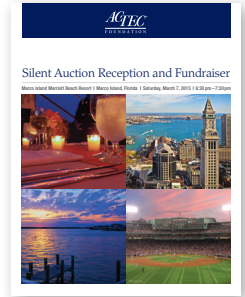


ACTEC Foundation 2015 Silent Auction Fundraiser

We hope that you are looking forward to the ACTEC Foundation's Silent Auction Reception and Fundraiser, a highlight of the ACTEC 2015 Annual Meeting in Marco Island, Florida. On Saturday, March 7, 2015, from 6:30 pm – 7:30 pm, ACTEC Fellows, spouses, partners, and special guests will have the opportunity to bid on an exclusive array of vacation stays, sports events, and customized special evening events and day trips.

Proceeds from the silent auction support Foundation programs and services that bring direct value to you as a Fellow of the College, including the free subscription service to SSRN's Wills, Trusts & Estates eJournal.

View the silent auction catalog to see details of the items that will be up for bid. Catalogs are available on the ACTEC 2015 Annual Meeting app and at the ACTEC Foundation booth near the ACTEC registration desk.



If you would like to learn more about the silent auction or how you can help, see auction committee members, Henry Gissel, Joshua Rubenstein, Kurt Sommer, and Jeff Thede.

We look forward to reporting on the success of this year's event. ■

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.

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 by doubling the dollar amount of charitable contributions through an employer matching-gift program. Contact your firm's benefits administrator for more information.

Online—Making an online donation is simple, secure, and cost-efficient. Visit www.actecfoundation.org/donation.

ACTEC FOUNDATION STAFF

Executive Director

Deborah O. McKinnon

Membership and Foundation Management Director

Amy Michaud
amy.michaud@actec.org
(202) 684-8453

Communications Director

Leah Weatherspoon
lweatherspoon@actec.org
(202) 688-0271

ACTEC Foundation—National Office

901 15th Street NW, Suite 525
Washington, D.C. 20005

To learn more visit:

www.actecfoundation.org