

NEWS

2018 SUMMER MEETING



President's Message

2018 has been a busy and exciting year for the ACTEC Foundation. In February, we went live with an updated website. The increased visibility for the Foundation and College have been outstanding. Visitors to the site have increased 197% over the year before. The updated site is targeted to communicate to three audiences: trust and estate professionals, families looking for quality content, and law students with an interest in the profession.

Trust and estate professionals have been well served by ACTEC's new podcast series: [ACTEC Trust and Estate Talk](#). Between February 22 to May 31, the podcasts have been downloaded 1,871 times. 21 podcasts have been recorded and #12, *The New Partnership Audit Rules and Why They Are So Important for Estate Planners*, will be released just before the Summer Meeting. Susan Snyder, Executive Producer, has also lined up another 20 presentations to be recorded during the Summer Meeting. Additionally, professionals have downloaded 117 of the [3rd Edition of Engagement Letters](#); 23 ACTEC *Commentaries on Model Rules of Professional Conduct*, and the Foundation Store has sold \$2,250 Quicken Fiduciary Accounting Templates and mailed four print editions of the *ACTEC Commentaries*.

Families looking for valuable content are also being served well. The Trust and Estate Planning Guide webpage has the highest number of webpage views on the site — 1,100. The [What is a Revocable Trust and Do I Need One?](#) video has had 235 views and the [Understanding Your Power of Attorney](#) video has received 95 views. Executive Producer Lauren Wolven and team are planning on adding five new videos for families this Fall. Stay tuned for more great content to share with your clients and families.

Students and law schools are also delighted with the professional content, the academic symposium opportunity, the Mary Moers Wenig 2018 Student Writing Competition, and news announcements. If you haven't read the announcement regarding the [Dennis I. Belcher Young Leaders Program Class of 2017-2019](#), please take a moment to meet the latest class of Young Leaders.

The ACTEC Foundation leadership is excited to support the College and ACTEC Fellows in such a dynamic way. Please pass on your recommendations and share the content available on the website.

Sincerely,

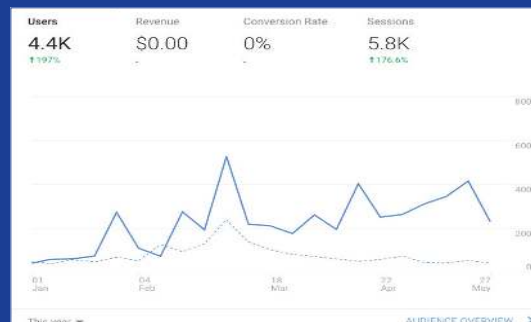
L. Henry Gissel, Jr.
President, ACTEC Foundation

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2018 FOUNDATION WEBSITE ANALYTICS

Users:	4.4K; an increase of 197%
Sessions:	5.8K; an increase of 176% (shows users that are repeat visitors)
Notable Dates:	Writing competition announcement 1/31; Site live 2/22 with ACTEC Trust and Estate Talk; March Meeting 3/7; and new podcast releases



THE DENNIS I. BELCHER YOUNG LEADERS PROGRAM 2017 – 2019 CLASS



NATHAN BROWN



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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:

Online – Making an online contribution is simple, secure, and cost-efficient. Visit <https://actecfoundation.org/donate/>

Check – Make the check payable to “ACTEC Foundation” and mail to ACTEC Foundation, 901 15th Street, NW, Suite 525, Washington, DC 20005. Be sure to include information on where to direct the contribution.

Amazon Smile – Select the ACTEC Foundation as your beneficiary when you are shopping on smile.amazon.com. For eligible purchases at AmazonSmile, the AmazonSmile Foundation will donate 0.5% of the purchase price to the ACTEC Foundation.

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

Stock Donations – The ACTEC Foundation can accept your gift of stocks or securities. Contact Membership Director and Foundation Management, Amy Michaud, at Amy.Michaud@actec.org.

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.

Planned Giving – Contact James D. Spratt, Jr., Esq. at (404) 523-8337 or jimspratt@bslf.com if you would like information on how to name the Foundation as the recipient of a specific bequest under a will or trust; how to name the Foundation as a beneficiary under an IRA or other employee benefit plan; or about how to name the Foundation as the beneficiary of a CRUT.

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

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