



## President's Message

Welcome to the Summer 2024 edition of *The ACTEC Foundation Newsletter*! I hope that this June finds everyone happy and healthy. I am pleased to report that The ACTEC Foundation is in good financial health with many exciting projects on the horizon.

First and foremost, I am happy to report that the 2024 Longest Drive Challenge raised **over \$44,000!** Please read the full story later in the *Newsletter*. Also, The ACTEC Foundation-funded *Trust and Estate Talk* podcast series has reached an important milestone – be sure to read about it in this *Newsletter*!

I want to remind everyone that through June 30, **The Mary Moers Wenig Student Writing Competition** is accepting entries. Please encourage law students you know to submit their papers for consideration. This competition is open to any law student in good standing (full-time or part-time) who is currently enrolled at the time of submission or was a student within the past 90-day period prior to submission, as a J.D. or LL.M. candidate in an ABA-accredited law school within the United States or its possessions. First place includes a \$5,000 cash award, publication in the *ACTEC*

*Law Journal*, and a full tuition scholarship to the **Heckerling Graduate Program in Estate Planning** at the University of Miami School of Law for the 2024–2025 or 2025–2026 academic year. (Candidates must apply and be admitted as full-time students to be considered for the scholarship).

Please take time to review the list of generous donors who have made gifts to support The ACTEC Foundation since February 13, 2024. It is only with the support of generous donors that The Foundation can support programs like The Mary Moers Wenig Student Writing Competition, the *ACTEC Trust and Estate Talk* podcast, and so many more worthwhile programs that educate and inform the trust and estate practice.

Be sure to frequently visit our website, [actecfoundation.org](http://actecfoundation.org), for information about the other great projects promoted and funded by The Foundation.

Wishing you a healthy (and cool) summer,

Yours sincerely,

John T. Rogers, Jr.

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## The 2024 ACTEC Longest Drive

Thanks to the generous contributions of ACTEC Fellows, The Foundation has surpassed its fundraising goal of \$35,000, raising over \$44,000! Your support is invaluable in funding the programs of The Foundation, including the **Academic Symposia**, the annual **Mary Moers Wenig Student Writing Competition**, the **Dennis I. Belcher Young Leaders Program**, and the continued funding of **Social Science Research Network** subscriptions, which are free for ACTEC Fellows. The Foundation also supports key communication and outreach projects for the College, including the **ACTEC Estate Planning Essentials** videos and the **ACTEC Trust and Estate Talk** podcasts. The videos and podcasts are the second-highest drivers of public engagement on ACTEC's website!

The Southeastern Region's **Dana G. Fitzsimons, Jr.** aced every round,



raising \$4,450 during the first round—setting a Spring Fundraiser record by meeting the players' individual fundraising goal

(\$4,375) in the first week—and pushed forward to raise a total of \$15,535 for The Foundation!

The Rocky Mountain Region's **Stephanie M. Tuthill** raised an impressive \$5,375 to finish second overall, and **Elizabeth Holland Hutchins**, representing the Southern Region, was close behind, raising \$4,750 to finish third.

The College extends heartfelt thanks to all Fellows who donated and the ACTEC Regents who made this year's Spring Fundraiser a success! Your support plays a vital role in advancing the trust and estate field.

See the **Leaderboard** for the final standings.



## ACTEC Trust and Estate Talk Reaches Major Milestone

On May 21, *ACTEC Trust and Estate Talk* celebrated a significant achievement with the release of its 300th podcast episode, "**Estate Planning in 2024**," presented by ACTEC Past President Stephen R. Akers. Reflecting on this accomplishment, ACTEC President Susan D. Snyder, who served as the series' first executive producer, expressed, "Reaching our 300th podcast is a significant milestone for this series and for ACTEC. The podcasts have been downloaded over 575,000 times and have greatly enhanced the visibility of the College among ACTEC Fellows, law students, and trust and estate practitioners." Thank you to everyone who contributed to The Foundation and made this milestone possible!

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Thank you to all of the Fellows who have supported The ACTEC Foundation from February 13 through June 6, 2024!

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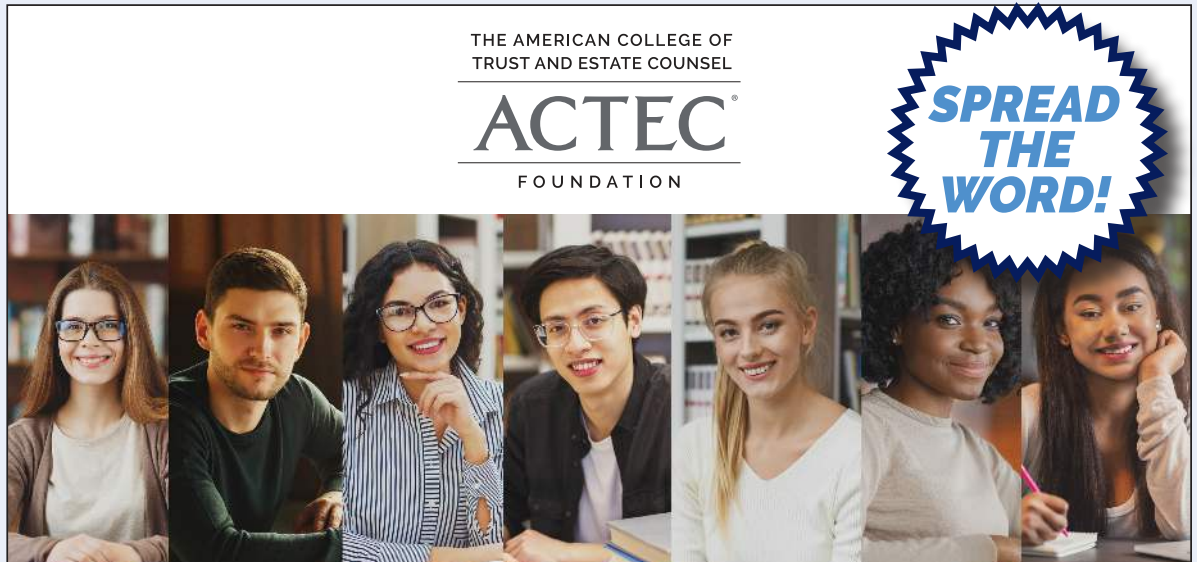
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# MARY MOERS WENIG STUDENT WRITING COMPETITION

**DEADLINE: JUNE 30, 2024**

**Area and Topics:** The paper must relate to the area of trusts and estates, broadly defined. Any one or more of the following topics are appropriate for discussion:

- Business Planning
- Charitable Planning
- Elder Law
- Employee Benefits
- Fiduciary Accounting
- Fiduciary Administration
- Fiduciary Income Taxation
- Fiduciary Litigation
- Estate Planning and Drafting
- Professional Responsibility
- Substantive Laws for the Gratuitous
- Transmission of Property
- Wealth Transfer Taxation (Estate, Gift and GST Tax)

**1st Prize**

A Full Tuition Scholarship to the Heckerling Graduate Program in Estate Planning at the University of Miami School of Law for the 2024-2025 or 2025-2026 academic year (candidates must apply and be admitted as full-time students to be considered for the scholarship), \$5,000 award and publication in the *ACTEC Law Journal*.

**2nd Prize**

\$3,000 award, online publication on the ACTEC Foundation's website, and possible publication in the *ACTEC Law Journal*.

**3rd Prize**

\$1,000 award, online publication on the ACTEC Foundation's website, and possible publication in the *ACTEC Law Journal*.

Visit [actecfoundation.org/law-student-writing-competition](https://actecfoundation.org/law-student-writing-competition) to find out more.

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## How to Contribute

The ACTEC Foundation is committed to promoting scholarship and education in trust, estate and tax law. 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 [actecfoundation.org/donate](https://actecfoundation.org/donate)

**Check** – Make the check payable to "ACTEC Foundation" and mail to:

The ACTEC Foundation  
P.O. Box 825922  
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Be sure to include where any acknowledgement should be sent.

**Annual Membership Dues** – When remitting ACTEC 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 and Foundation Director, Amy Michaud, at [Amy.Michaud@actec.org](mailto: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.

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

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