

ACTEC[®]

FOUNDATION

NEWS



President's Message

As we head into fall and winter, I am reminded that it's time to consider my end-of-year charitable giving. The ACTEC Foundation's All College Campaign letter will be arriving in your mailboxes soon, and I hope you

will consider including the ACTEC Foundation, as I will, in your year-end charitable donations. The many programs your generous donations support—the Mary Moers Wenig Student Writing Competition, the Student Editorial Board at Hofstra, the Trust and Estate Talk Podcasts, and the ACTEC Estate Planning Essentials Videos, just to name a few—bring so much valuable content to our profession! These programs could not exist without your support. Please make a donation to champion these essential trust and estate programs in the coming holiday season.

In this issue of the Fall 2026 Newsletter, you will find the winners of the 2026 Mary Moers Wenig Student Writing Competition, a newly created page on our website describing the L. Henry Gissel, Jr. Spirit of ACTEC Lecture Series, and a brief history of how the Foundation's Blue Ribbon Fundraising Campaigns came into existence. Here's a quick reveal about the Blue Ribbon campaigns—they were the brilliant idea of our own Past President L. Henry Gissel, Jr., and are among the many reasons the Board

decided to honor him with a Lecture series. This edition of the newsletter will also showcase our valued donors since the Summer 2026 Meeting—as always, with our gratitude for their support!

We have so much to celebrate as the end of the year approaches! The Foundation is about to release its inaugural Impact Report, which provides a summary of the Foundation's work over the last three years of Immediate Past President John T. Rogers, Jr.'s term. The Foundation plans to publish this report every three years to give stakeholders a high-level overview of its fundraising efforts, finances, communications, and donor-supported programs.

As you read this newsletter, and later, the Impact Report, please know that your ideas are always welcome. I look forward to hearing your thoughts as to how the Foundation can continue to improve.

Thank you for your continued support of the ACTEC Foundation.

With gratitude,

Lora G. Davis
ACTEC Foundation President

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2026 Student Writing Competition Winners Announced

The results are in! The ACTEC Foundation congratulates the winners of the **2026 Mary Moers Wenig Student Writing Competition**, which received a record 33 submissions from law students across the country.

Luke D. DeFio, Albany Law School, earned first place for "The Witness That Wasn't: Electronic Wills, Generative AI, and the Coming Collapse of Probate Authentication." Cassandra Nelson, New York University School of Law, received second place, while Chloe Clements, Howard University School of Law, and Heather Goss, Louisiana State University Paul M. Hebert Law Center, tied for third place.

The Foundation is proud to support this annual competition and to encourage the next generation of trust and estate professionals to pursue meaningful scholarship in the field. Congratulations to this year's winners for their outstanding work and contributions to the future of trusts and estates.

2026 Mary Moers Wenig Student Writing Competition Winners

First-Place	Second-Place	Third-Place (Tie)	
			
Luke D. DeFio Albany Law School	Cassandra Nelson New York University School Of Law	Chloe Clements Howard University School Of Law	Heather Goss Louisiana State University Paul M. Hebert Law Center

Lectures Exploring the Values That Define Excellence in Law



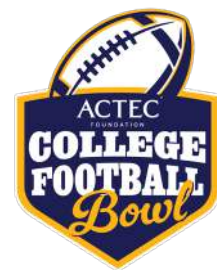
The ACTEC Foundation has launched a new webpage highlighting the **L. Henry Gissel, Jr. Spirit of ACTEC Lecture Series**, which honors the life and legacy of longtime ACTEC Fellow, leader, and mentor L. Henry Gissel, Jr.

Presented every other year, the lecture brings together distinguished speakers to explore the ethical, professional, and collegial values that define excellence in the practice of law. The series reflects Henry's belief that legal expertise should be paired with integrity, mentorship, collegiality, and a spirit of service.

The new webpage brings together the first two lectures in the series: Judith W. McCue's 2023 presentation, "At the Intersection of the Ethical and Collegial Aspects of the Practice of Law: What Would Henry Do?" and Ann B. Burns' 2025 presentation, "'Minnesota Nice' Collegiality in Today's Trust and Estate Practice."

Both lectures are embedded on the page, creating an enduring resource that celebrates Henry's legacy while encouraging thoughtful discussion about the responsibilities lawyers have to their clients, their profession, and one another. The Foundation looks forward to continuing the series with the next L. Henry Gissel, Jr. Spirit of ACTEC Lecture at the 2027 Annual Meeting.

Fall Fundraiser—ACTEC Foundation College Football Bowl



Join us in a fun way to show your support for your favorite College NCAA Football division AND support the ACTEC Foundation with a little friendly competition in the ACTEC Foundation College Football Bowl! Running from October 5 to October 26, this fundraiser lets you get a little skin in the game! Show your team spirit at the Fall Meeting in Denver by wearing your alma mater's team mascot on a hat or jersey, and donate to support the NCAA Division I Conference that boasts your team! The winning conference wins the ACTEC Foundation College Football Bowl and bragging rights!

Inaugural Foundation Impact Report

In a new initiative, the ACTEC Foundation is set to issue its inaugural Impact Report, a triennial review of the Foundation's financial information, fundraising successes, and how donations are being used to educate students, strengthen the trust and estate profession, and engage the public by providing useful information as they and their families begin their estate planning journeys.

This first report—and future reports—are intended to inform the Foundation's stakeholders of critical programs being funded. From student programs like the Mary Moers Wenig Student Writing Competition that inspire students to consider a career in the trust and estate field, to leadership programs designed for rising professionals like the Dennis I. Belcher Young Leaders Program, to informational programs for the public like the ACTEC Estate Planning Essentials Videos, stakeholders will see concrete examples of the impact donor dollars are having on real people.

Transparency into the Foundation's financials will be provided in this report as well. It's imperative that stakeholders have an opportunity to see how donor dollars are managed by the ACTEC Foundation.

Finally, stakeholders will see how the money is raised. From fun and competitive online fundraisers, to the inspiring and heartwarming end-of-year All College Campaign, to the thrice-annual Blue Ribbon campaigns, stakeholders will see how the Foundation raises the funds that support the trust and estate programming for students, professionals, and the public—the three main audiences the Foundation strives to serve.

Look for this report to be issued right after the Fall meeting, and please provide your feedback to any member of the Foundation Executive Committee or Board of Directors.

Get Your Blue Ribbon at the Fall Meeting!



At the July 2019 Meeting of the Foundation's Executive Committee, the idea of the Blue Ribbon Fundraising Campaigns was born. The idea came from beloved ACTEC Foundation Past President (2017–2020) L. Henry Gissel, Jr., who thought having a fundraiser at each National meeting would be a way to raise funds for the Foundation's programs at National meetings while raising awareness among ACTEC Fellows of the programs the ACTEC Foundation supports. Fellows who made donations would be given a ribbon to wear on their meeting badges as a way to show their pride in supporting the Foundation.

The ACTEC Foundation introduced its first "Blue Ribbon Campaign" at the October 2019 Fall Meeting in Philadelphia, and it was a big success! ACTEC Fellows who donated to the ACTEC Foundation sported a jaunty Blue Ribbon proclaiming them a "Foundation Donor."

Since then, the Blue Ribbon Campaigns have raised more than \$41,000. These small but powerful campaigns, mounted three times a year, have helped raise awareness of the Foundation among Fellows, as well raise donations to support Foundation-funded programs that educate law students, train leaders, strengthen trust and estate law, and give the public information they need to plan for their families' future.

Any donation, large or small, will help realize Henry's vision for the Blue Ribbon Campaigns. Don't forget to **make your donation now** so you can proudly sport your Blue Ribbon at the Fall 2026 Meeting in Denver!

Already sporting the blue ribbon swag on your badge? Thank you!

All College Campaign—It's Coming!

The Foundation's biggest fundraiser is about to hit your mailbox—the All College Campaign! This end-of-year campaign is mailed right after the Fall Meeting to all Fellows of the College. As you write your end-of-year checks to worthy charities, please remember the charity that elevates your trust and estate profession—the ACTEC Foundation. When you receive the All College Campaign, make time to write that check, make a credit card donation, or if you are 70 and ½ or older, take **Professor Chris Hoyt's advice** and make the donation from your IRA—whichever way is most convenient for you. The ACTEC Foundation supports students as they prepare to enter the trust and estate field through the Mary Moers Wenig Student Writing Competition and the Hofstra Student Editorial Board, shapes rising leaders in T&E through the Dennis I. Belcher Young Leaders Program, informs seasoned professionals with the Trust and Estate Talk podcasts, and educates the public through the ACTEC Estate Planning Essentials Videos.

We could not provide funding to these essential programs without your donations. Please, as you enter this holiday season, remember the ACTEC Foundation in your charitable giving.

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The Foundation Thanks Our Donors from June 17, 2026 to September 28, 2026 For Their Generous Support.

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TRUST AND ESTATE COUNSEL

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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

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

The ACTEC Foundation
P.O. Box 825922
Philadelphia, PA 19182-5922

Be sure to include where any acknowledgment 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 Senior Membership and Foundation Director, 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) 523-3018 or jimspratt@duncanspratt.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 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.

Charitable Donations from Your IRA – Individuals aged 70 and ½ or older can make tax-free charitable gifts directly from their IRA.

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