



President's Message

Once again I am honored to be writing to you as the President of the ACTEC Foundation. Generous support from ACTEC Fellows like you makes the successful programs described below possible.

The [2019 Mary Moers Wenig Student Writing Competition](#) is now open! This competition encourages law students to explore trust and estate topics, and

supports their efforts with a first place prize of \$5,000, publication in the prestigious *ACTEC Law Journal* plus the offer of a full scholarship to the Heckerling Graduate Program in Estate Planning at the University of Miami School of Law for the 2019-2020 or 2020-2021 academic year. Please share the news of this exciting competition with professors, adjunct professors, or others who might know of law students who might be interested in participating in the Competition, now in its 16th year.

The Foundation is very proud to continue its support of the [ACTEC Trust and Estate podcasts](#) as well as the [ACTEC Family Estate Guide videos](#) with a recently approved grant of \$60,000. New podcasts and videos will be recorded at the 2019 Annual Meeting in La Quinta, California – look for new content on a regular basis!

The next ACTEC Foundation-supported academic symposium will be held in Fall of 2019 at the University of California Davis on the topic of **Empirical Analysis of Wealth Transfer Law**. In the last decade, empirical analysis has become a mainstay in leading law reviews and judicial opinions. This movement has also spread to the field of trusts, estates, and wealth transfer law. Papers will be published in the *UC Davis Law Review*.

Finally, please do take some time to review the ACTEC Foundation [website](#) for regular updates. You will find content for Students, for Professionals, and for Families, as well as new podcasts and videos.

Thanks to all of you who have provided support of the ACTEC Foundation, which makes these and other wonderful programs available. For those of you who have not yet made your annual gift, please remember that you still have time to do so in the Foundation's current fiscal year, if your donation is received by April 30, 2019. Memorial gifts in honor of ACTEC Fellows or their spouses are also much appreciated.

Sincerely,

L. Henry Gissel, Jr.
President, ACTEC Foundation

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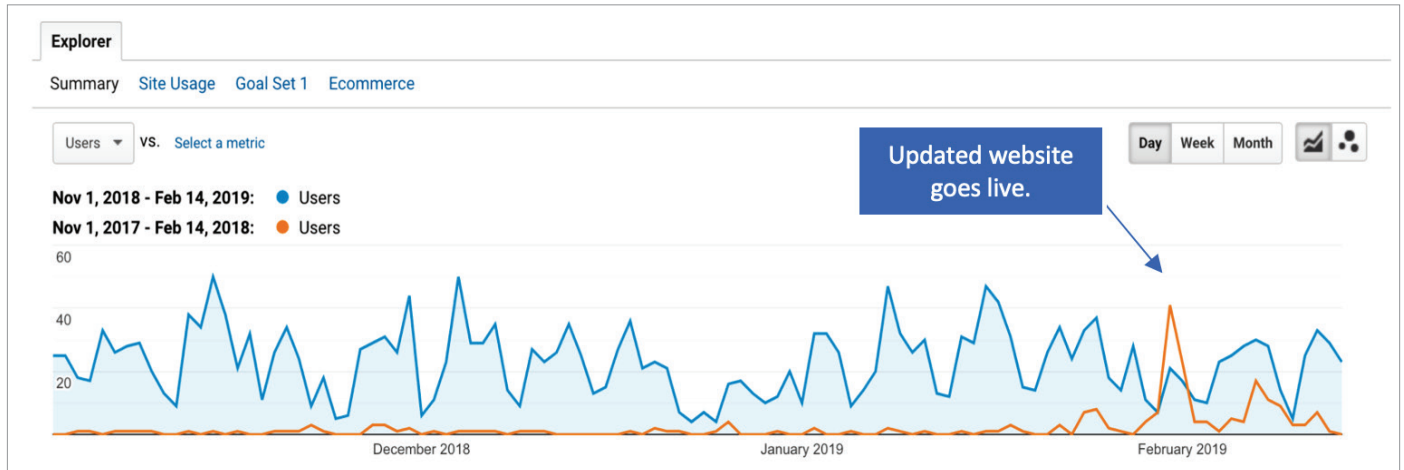
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A Year of Communication Success

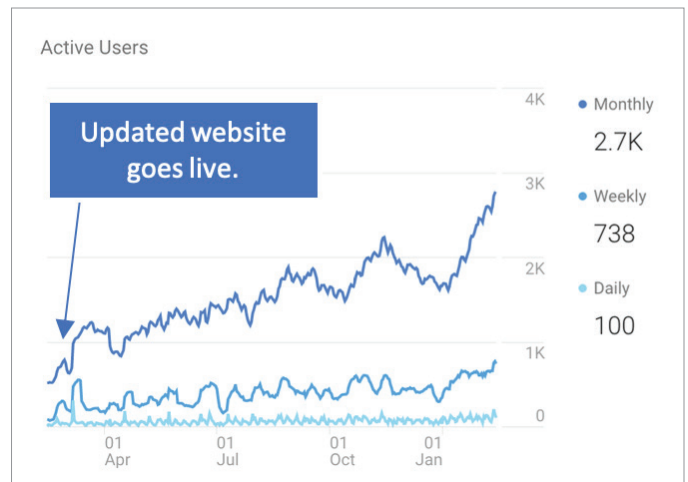
In February of 2018, the ACTEC Foundation updated actecfoundation.org and began releasing content for families and professionals in the form of ACTEC Trust and Estate Talk podcasts, on a regular basis. The success is evident in the number of users that visit the site daily. The orange line in the graph below shows 2017 visitors, compared with the blue line which is 2018 visitors.



The ACTEC Trust and Estate Talk podcasts have been downloaded over 20,000 times. The Family Estate Planning Guide webpage is consistently a top draw of visitors to the website. Over 400 wealth management professionals have downloaded Engagement Letters and/or The ACTEC Commentaries on the Model Rules of Professional Conduct. The site has also grossed over \$5,000 in sales from the Quicken Fiduciary Accounting Templates.

So, where do we go from here? It is important that people who are aware of the ACTEC Foundation web site communicate to the rest of College the content that is being offered. Please help promote these resources by:

- Sharing the actecfoundation.org website with clients and colleagues;
- Following ACTEC on social media sites and sharing the posts with your network;



- Donating to ensure continued success.

FROM THE DENNIS I. BELCHER YOUNG LEADERS PROGRAM TO ACTEC FELLOWS

The Dennis I. Belcher Young Leaders Program was developed to foster scholarship and education in trusts and estates, promote diversity and inclusivity, and encourage the development of potential ACTEC Fellows. Two Young Leader graduates became ACTEC Fellows in 2017: Jonathan P. Lee and Raj A. Malviya. Raj also participated in an ACTEC Trust and Estate Talk podcast with David A. Berek which posted in February 2019: [“Trust Residency and State Tax Nexus Planning”](#) and is serving on the drafting committee of the Kaestner amicus brief. Both Young Leaders are terrific examples of the success of the program.



Jonathan P. Lee,
Columbia, SC
elected 2017



Raj A. Malviya,
Grand Rapids, MI
elected 2017

Foundation Grant Achievements

The ACTEC Foundation approved a grant request from the Communications Committee for \$60,000 to continue the production of the [ACTEC Family Estate Planning Guide](#) and the [ACTEC Trust and Estate Talk](#) initiatives, including new podcasts. Executive Producers Susan Snyder and Stacy E. Singer have plans on recording new content for both projects during 2019 Annual Meeting and future national meetings.

The “Estate Planning and Trust Management for a Brave New World,” a 4-part special from R. Hugh Magill’s Trachtman Lecture, has been downloaded almost 2,000 times since its release beginning November, 2018. “How to Start the Formation of a Business Entity,” another popular ACTEC Trust and Estate Talk, has been downloaded almost 500 times since it was released October 23, 2018.

New Family Estate Planning Guide videos are in production as well. “What is Probate?,” the first of the shorter conversational video style productions, was released at the end of January. “What is Joint Tenancy and When Should I Use It?” and “How Does a Revocable Trust Avoid Probate?” are the next two videos in the pipeline.

You can still make a gift in the Foundation’s current fiscal year with a donation today.

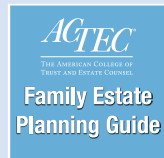
actecfoundation.org/donate

Most Popular ACTEC Trust and Estate Talk Podcast Downloads Since the 2018 Fall Meeting



1. “Estate Planning for a Brave New World” – Special Four Part Series with ACTEC Fellow [Hugh R. Magill](#)
2. “How to Start the Formation of a Business Entity” with ACTEC Fellows [Steven B. Gorin](#) and [T. James Lee](#)
3. “Lending in the Probate Context” with ACTEC Fellow [Professor David O. Horton](#)
4. “Sections 199A and The 20% Deduction for Qualified Business Income” with ACTEC Fellows [Lora G. Davis](#) and [Steven B. Gorin](#)
5. “Follow Up on the 2017 Tax Cuts and Jobs Act” with ACTEC Fellow [Beth Shapiro Kaufman](#)
6. “The Ethical Hazards of Digital Assets: What Estate Planners Need to Know” with ACTEC Fellow [John T. Rogers Jr.](#)
7. “2018’s Priority Guidance Plan from the IRS and Treasury” with ACTEC Fellow [Beth Shapiro Kaufman](#)

Family Estate Planning Guide Videos Being Recorded at Annual Meeting



- “Should I Sign New Estate Planning Documents When I Move to a New State?” with ACTEC Fellows [Anita M. Sarafa](#) and [Jonathan W. Michael](#)
- “Divorce and Estate Planning” with ACTEC Fellows [Diana S.C. Zeydel](#) and [Richard R. Gans](#)
- “How to Choose your Executor or Trustee” with ACTEC Fellows [Lorraine K. Cavataio](#) and [Stacy E. Singer](#)
- “What to Consider When Setting Up Trusts for Children” with ACTEC Fellows [Tami Conetta](#) and [Natalie M. Perry](#)
- “5 Reasons to Update your Estate Plan” with ACTEC Fellows [Nancy C. Hughes](#) and [Natalie M. Perry](#)
- “Handling Digital Assets at Death” with ACTEC Fellows [Suzane Brown Walsh](#) and [Stacy E. Singer](#)
- “Coordinating Beneficiary Designations with the Overall Estate Plan” with ACTEC Fellows [Frank Adams](#) and [Richard R. Gans](#)

Mary Moers Wenig Student Writing Competition

Deadline is June 17, 2019

Share with your law school and student contacts.



1st Prize — A Full Tuition Scholarship to the [Heckerling Graduate Program in Estate Planning](#) at the University of Miami School of Law for the 2019-2020 or 2020-2021 academic year (candidates must apply and be admitted as full-time students to be considered for the scholarship), \$5,000 and publication in the *ACTEC Law Journal*.

2nd Prize — \$3,000, online publication on ACTEC's website, and possible publication in the *ACTEC Law Journal*.

3rd Prize — \$1,000, online publication on ACTEC's website, and possible publication in the *ACTEC Law Journal*.

The Mary Moers Wenig Student Writing Competition is just one of the ACTEC Foundation's missions to encourage and support legal education in the areas of wills, trusts and estates. The Foundation recognizes that law students are the future of the trust and estate profession. Our intent is to help shape the next generation of leaders in the field.

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 The 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 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.

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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