

President's Message



At the Fall 2022 meeting of The ACTEC Foundation Board of Directors, we will be focusing on the future of The ACTEC Foundation -- what I like to call "Foundation 3.0." L. Henry Gissel, Jr., our beloved Past President, did a great job moving the Foundation forward -- adding regular meetings of the Executive

Committee, overseeing a much-needed rewrite of the Bylaws, and raising awareness of the work of the Foundation among ACTEC Fellows and other trust and estate practitioners. His work brought the Foundation to "Foundation 2.0." I have been building on Henry's work over the last two years, and look forward to the Board's review of ideas for "Foundation 3.0" in November.

In more news, I am pleased to share that in honor of North Carolina Fellow Rudy L. Ogburn, Fellows of the Southeast Region and Tennessee are raising money for a Memorial Fund for The ACTEC Foundation to honor Rudy's memory. The "Rudy Ogburn Memorial Fund for the Southeast Fellows Institute" has been established through The ACTEC Foundation for the purpose of making grants to provide tuition assistance to students attending the Institute. The grant-making opportunity recognizes the many contributions made by Rudy, who passed away on March 30, 2022. Rudy was one of the three original Deans of the Southeast Fellows Institute and was dedicated to the legal profession, the College, and the Southeast Fellows.

To date, more than \$67,000 of the \$100,000 goal has been raised.

Finally, all ACTEC Fellows should have received their All-College Campaign mailing. I hope you will join me in making a **year-end gift** to The ACTEC Foundation, to support the grant-making of which we are all so proud. At the November 2022 Board of Directors meeting, the Board will consider several grants, including a grant for the eighth class of Dennis I. Belcher Young Leaders. To date, eight graduates of the Dennis I. Belcher Young Leaders Program have been elected as ACTEC Fellows: Brandon A.S. Ross, 2018-2020 Class, elected at the 2022 Annual Meeting; Elizabeth Glasgow, 2015-2017 Class, elected at the 2021 Annual Meeting; Toni Ann Kruse, 2016-2018 Class, elected at the 2020 Annual Meeting; JP Lee and Raj Malviya, 2016-2018 Class, elected at the 2017 Fall Meeting; Marissa Dungey, 2016-2018 Class, elected at the 2020 Fall Meeting; Chasity Sharp Grice, 2016-2018 Class, elected at the 2021 Annual Meeting; and John Strohmeier, 2017-2019 Class, elected at the 2020 Fall Meeting. Your donation supports this program and many others.

Yours sincerely,

Jeffrey C. Thede

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*Contributions from June 11
to October 5, 2022*

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L. Henry Gissel, Jr. Spirit of ACTEC Lecture



Past President Judith W. McCue will present the inaugural L. Henry Gissel, Jr. Spirit of ACTEC Lecture at the 2023 Annual Meeting in New Orleans. The lecture was established to honor L. Henry Gissel, Jr. (1936 – 2020), who was an active Fellow in the College for 47 years, Past President of the College and The Foundation, and who had a significant impact on ACTEC, The Foundation, and all the Fellows who had the privilege to know him. The lecture will be centered on the ethical and collegial aspects of the practice of law, particularly focused on the trusts and estates practice.



The Dennis I. Belcher Young Leaders Program



The Dennis I. Belcher Young Leaders Program was designed to foster scholarship and education in trust and estate matters, promote diversity and inclusivity and encourage the development of potential ACTEC Fellows. Initiated in collaboration with the American Bar Association Real Property, Trust and Estate Law Section (RPTE) Fellows program, it provides successful graduates of the two-year RPTE program an opportunity to extend their participation in RPTE leadership activities through the financial support of The ACTEC Foundation. In March 2018, the program was named after Dennis I. Belcher, ACTEC President 2009-2010, a leader of the College and mentor to many young trust and estate lawyers.

participation in committee leadership roles, speaking and writing.

The former Dennis I. Belcher Young Leaders are active Fellows in the College. Brandon Ross, who was elected in March of 2022, has already attended three ACTEC meetings: the 2022 Summer Meeting in Banff; the 2022 Mid-Atlantic Region Meeting and the 2022 Southeast Region Meeting. Toni Ann Kruse serves on both the New Fellows Steering Committee and the Communications Committee and has attended numerous ACTEC meetings. She also recorded a Voices of The ACTEC Foundation video about the program with JP Lee. JP is another example of a graduate of the Dennis I. Belcher Young Leaders Program who, upon election to ACTEC, became a very active Fellow. JP serves on the New Fellows Steering Committee, the Practice Committee, and the Professional Responsibilities Committee as well as serving as ACTEC's Tennis Coordinator. Raj Malviya serves on the Long Range Planning Committee, the FATF Task Force, the International Estate Planning Committee and the Fiduciary Income Tax Committee, and has attended numerous meetings. Raj has also recorded two podcasts for the Trust and Estate Talk series: "Trust Residency and State Tax Nexus Planning" and "An Introduction to the Corporate Transparency Act." Marissa Dungey has attended numerous meetings, and recorded a podcast: "Estate Planning for Principals of Private Equity and Hedge Funds." Chasity Grice is a member of The ACTEC Foundation's Board of Directors and serves on the Membership Selection Committee.

The ACTEC Foundation congratulates all Dennis I. Belcher Young Leaders who have been elected ACTEC Fellows!

The ACTEC Foundation is proud to support the Dennis I. Belcher Young Leaders Program. To date, eight graduates of the Dennis I. Belcher Young Leaders Program have been elected as ACTEC Fellows: Brandon A.S. Ross, elected at the 2022 Annual Meeting; Elizabeth Glasgow, elected at the 2021 Annual Meeting; Toni Ann Kruse, elected at the 2020 Annual Meeting; JP Lee and Raj Malviya, elected at the 2017 Fall Meeting; Marissa Dungey, elected at the 2020 Fall Meeting; Chasity Sharp Grice, elected at the 2021 Annual Meeting; and John Strohmeyer, elected at the 2020 Fall Meeting. While election to ACTEC is not guaranteed, the fact that these individuals have met ACTEC's high standards for nomination and election as a Fellow demonstrates that the Dennis I. Belcher Young Leaders Program is effective in helping diverse trust and estate attorneys who, are early in their practice, develop leadership skills and hone their skills as trust and estate attorneys through



The ACTEC Foundation-funded ACTEC Trust and Estate Talk podcast series will soon reach its 230th episode. Since its inception in 2018, the podcasts have had over 335,000 page views and 335,000 downloads.

ACTEC Fellow **Susan D. Snyder**, now ACTEC Vice President, brought the concept to the attention of the Communications Committee. The ACTEC Foundation approved an initial grant in October of 2018 and the first podcast aired that year.

Fellow and current series host **Natalie Perry** states "The series has significantly raised awareness of the College among trust and estate professionals! The podcasts have been downloaded over 336,000 times and because they are also transcribed, many professionals read the content."

Please listen to and **share** the many podcasts on the ACTEC website. And keep an eye out for upcoming timely topics such as ACTEC's Comments on Section 2053, Authenticating Cross-Border Documents and the Importance of e-App, Work-Life-Balance for Attorneys and more!

The 2022 Mary Moers Wenig Student Writing Competition Winners



First Place Winner:
Morgan Wahler
University of San Diego
School of Law



Second Place Winner:
Vincent Ferry
Maurice A. Dean School of
Law at Hofstra University



Third Place Winner:
Jasmine Sadeghani
Pepperdine Caruso
School of Law

The ACTEC Foundation announced the winners of the 2022 Mary Moers Wenig Student Writing Competition. Three law students' submissions stood out among 16 entries received and reviewed by a panel of judges appointed by the **Legal Education Committee**. Panel Chair **T. Randolph Harris** states: "Because of the high quality of the papers this year, the judges had a difficult task selecting the winners. The late Professor Wenig, after whom the competition is named, would be proud."

First place winner Morgan Wahler is a third-year student at the University of San Diego School of Law from San Jose, California. At the University of San Diego, she has helped first-year students as an Academic Success Fellow for Torts, Property, and Criminal Law. During the past two summers, she worked as a law clerk for Berliner Cohen in their Estate Planning department and developed a growing interest in the field.

Vincent Ferry, who won second place, is a third-year law student at the Maurice Deane School of Law at Hofstra University. He is a proud member and Notes and Comments Editor of the *American College of Trusts and Estates Counsel Journal*. In addition to his work on ACTEC, he serves as

a senator of his school's student bar association and vice-president of Hofstra Law Disability Rights and Community. This semester he has been working as a legal intern at Hofstra Law's Law Reform Advocacy Clinic, where students represent a Guantanamo detainee in a habeas corpus case challenging his medical treatment. Vincent has always been passionate about social justice and improving public policy, and hopes to pursue a legal career that reflects his values, advances disadvantaged groups' rights, and promotes equity for all.

Jasmine Sadeghani is a third-year student at Pepperdine Caruso School of Law, where she is a Note and Comment Editor on the *Pepperdine Law Review*. Before attending law school, Jasmine studied History at the University of California, Berkeley, and had the opportunity to study abroad in Poland, the Czech Republic, and Germany. She cultivated an interest in Wills & Trusts during law school and hopes her article will provide a meaningful, forward-looking approach to the conversation about posthumous children.

ACTEC congratulates the winners and all those who submitted, and thanks Randy and the panel for another successful competition!

2022 ACTEC Foundation Donors

Thank you to all who have supported The ACTEC Foundation from June 11 to October 5, 2022!

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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 percent 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) 523-3018 or jimspratt@bowdenspratt.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.

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