



## President's Message

The 2022 ACTEC Foundation Spring Derby (the "Race of the Regions") started off the Foundation's fiscal year with a fundraising drive to the finish line. The 2022 Derby has raised more than \$32,000 to date.

Farhad Aghdami on Sweet Virginia took home the cup for the Southeast Region when he reached his fundraising goal of \$3,000 on April 28, with Josh Husbands on Timber Jim placing second for the Western Region by reaching his fundraising goal of \$3,000 on May 12. Stephanie Tuthill on Canyon's Edge captured third place for the Rocky Mountain Region by reaching her fundraising goal of \$3,000 on May 16. The top three fundraisers in the 2022 ACTEC Foundation Race for the Regions were Farhad Aghdami on Sweet Virginia, who raised \$6,750; Tara Pleat of 50 Shades of Hay, who raised \$4,450; and Josh Husbands on Timber Jim, who raised \$4,250.

Not only did Fellows support their Region's jockey, but their donations will continue to fund the many initiatives the ACTEC Foundation supports, including The Dennis I. Belcher Young Leaders program, the Mary Moers Wenig Student Writing Competition, the ACTEC Trust and Estate Talk, and the Family Estate Planning Guide, just to name a few. Congratulations to Farhad, and thank you to everyone who supported the ACTEC Foundation, and especially the jockeys!

2022 promises to continue its exciting start for the Foundation. The Board of Directors will be reviewing several new grant requests at the 2022 Summer Meeting in Banff, AB, Canada, and we invite Fellows with ideas for grants to please contact us. We will also be discussing "Foundation 3.0" – planning for the future of the ACTEC Foundation. In addition, we are actively organizing, in conjunction with ACTEC's Program Committee, the Inaugural L. Henry Gissel, Jr. Spirit of ACTEC Lecture, which will debut at the 2023 Annual Meeting in New Orleans. Honoring our beloved Past President, the biennial Lecture will center on the ethical and collegial aspects of the practice of law, with a focus on the trusts and estates practice area. Please watch your email for news about the inaugural lecturer!

For those of you attending the 2022 Summer Meeting, please join me in congratulating the jockeys. And if you'd like to help them take a victory lap, donations for The Derby are still being accepted through June 30.

Wishing you a healthy summer,

Jeffrey C. Thede

## ACTEC FOUNDATION BOARD

### President

Jeffrey C. Thede  
Portland, OR

### Vice President

John T. Rogers, Jr.  
Los Angeles, CA

### Treasurer

Kathleen R. Sherby  
St. Louis, MO

### Secretary, and Co-Chair, Grant Committee

Melissa J. Willms  
Houston, TX

### Co-Chair, Grant Committee

Lora G. Davis  
Dallas, TX

### Chair, Fundraising Committee

Christopher B. Hunt  
Minneapolis, MN

### Directors

Susan L. Abbott  
Boston, MA

Brad Bedingfield  
Boston, MA

Stephanie B. Casteel  
Reno, NV

Erik Dryburgh  
San Francisco, CA

David F. Edwards  
New Orleans, LA

Theron E. Fry  
Wichita, KS

Thomas P. Gallanis  
Iowa City, IA

Susan N. Gary  
Eugene, OR

Peter S. Gordon  
Wilmington, DE

Chasity Grice  
Memphis, TN

T. Randolph Harris  
New York, NY

Joseph G. Hodges, Jr.  
Denver, CO

Christopher R. Hoyt  
Kansas City, MO

Benetta Park Jenson  
Oak Creek, WI

Robert K. Kirkland  
Liberty, MO

W. Cameron  
McCulloch  
Houston, TX

Michele A.W.  
McKinnon  
Richmond, VA

Charles Ian Nash  
Melbourne, FL

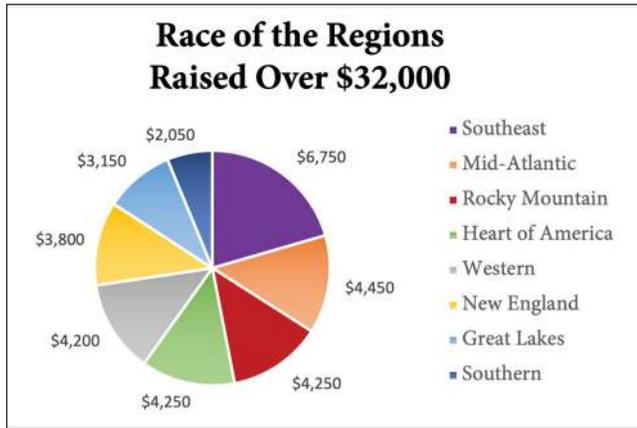
Jeanne L. Newlon  
Washington, DC

Bruce S. Ross  
Los Angeles, CA

Alan F. Rothschild, Jr.  
Columbus, GA

# The Race of the Regions Fundraising Totals

Thank you to the Spring Derby jockeys who led their regions to victory! The ACTEC Foundation-supported grants and programs will benefit from the generosity and enthusiasm of the ACTEC Fellows who supported the fundraising effort.



The **Academy of Interactive and Visual Arts** has awarded five Communicator Awards to The American College of Trust and Estate Counsel. The Communicator Awards is one of the largest competitive awards programs honoring creative excellence for communications professionals, receiving over 5,000 entries from across the U.S. and around the world. ACTEC received one (1) Award of Excellence and four (4) Awards of Distinction for audio and video content produced for ACTEC Family Estate Planning Guide, Planning for a Diverse and Equitable Future, and ACTEC Trust and Estate Talk. All three series are made possible through the support of The ACTEC Foundation.

## IN MEMORIAM CONTRIBUTIONS 2022

*Contributions from February 8 to June 2, 2022*

- Steve A. Brand
- Albert M. Fortier
- L. Henry Gissel, Jr.
- Robert D.W. Landon, II
- Jackson M. Bruce, Jr.
- Rudy L. Ogburn
- Jean D. Stockburger
- John F. Stroud

## 2022 ACTEC Foundation Donors

*Thank you to all who have supported The ACTEC Foundation from February 7 to June 2, 2022!*

- |                       |                        |
|-----------------------|------------------------|
| Susan L. Abbott       | Callahan & Associates  |
| Maureen C. Ackerly    | Jean Gordon Carter     |
| Frank T. Adams        | Stephanie B. Casteel   |
| Farhad Aghdami        | Rita Bragg             |
| David J. Akins        | Caughman               |
| John F. Allevato      | John M. Challis        |
| Robert E. Armstrong   | Darcy J. Chamberlin    |
| Theodore B. Atlass    | Charles Ian Nash       |
| Carl T. Baker         | Natalie B. Choate      |
| Merry Balson          | Mark M. Christopher    |
| Shannon K. Barks      | Jared R. Cloud         |
| Robert Barton         | Mark A. Conway         |
| Elizabeth A. Bawden   | James P. Cox, II       |
| Bruce O. Bekkedahl    | M. Patricia Culler     |
| Amy B. Beller         | Matthew D'Emilio       |
| Timothy O. Beppler    | Robert T. Danforth     |
| Gerry W. Beyer        | Lora G. Davis          |
| Bruce H. Bokor        | Mickey R. Davis        |
| Stephen M. Brainerd   | Lauren Y. Detzel       |
| Donna Braman          | Donald P. DiCarlo, Jr. |
| James R. Bright       | Nikola R. Djuric       |
| H. Chalk              | S. Gray Edmondson      |
| Broughton, Jr.        | David F. Edwards       |
| J. Lee Brown          | Kent E. Endacott       |
| Kelli Elizabeth Brown | David J. Estes         |
| Elaine M. Bucher      | Constance Tromble      |
| Peter W. Bullard      | Eyster                 |
| Ann B. Burns          | Josie Faix             |
| Lisa Weinstein Burns  | Debra L. Foster        |
| Christine A. Buttress | Charles D. Fox, IV     |
| Reynolds T. Cafferata | Terrence M. Franklin   |
| Randal B. Caldwell    | Gary B. Freidman       |

*continued next page*

## DONATIONS IN HONOR OF THE FOLLOWING PEOPLE

*Contributions from February 8 through June 2, 2022*

- |                     |                    |
|---------------------|--------------------|
| Ronald D. Aucutt    | Janet Wilson Moore |
| Edward Jay Beckwith | Barbara A. Sloan   |
| Peter S. Gordon     |                    |

DONATE TO



## 2022 ACTEC Foundation Donors continued

Patricia Friedman  
Theron E. Fry  
John F. Furniss, II  
Susan N. Gary  
Karen S. Gerstner  
Steven B. Gorin  
Lynne K. Green  
Virginia H. Grigg  
Bradley C. Grossenburg  
Richard L. Halbert  
Martin Hall  
Mark E. Haranzo  
Robert Matthew Harper  
John M. Harpootian  
Susan R. Harris  
Robert W. Hastings, II  
Miriam W. Henry  
David R. Hermenze  
Amy Morris Hess  
Joseph G. Hodges, Jr.  
Hoffman Sabban  
Watenmaker  
Case Hoogendoorn  
Andrew H. Hook  
Craig Hopper  
Susan T. House  
Cristina Hug

Christopher B. Hunt  
Joshua E. Husbands  
Elizabeth Holland  
Hutchins  
Janet Wilson Moore  
Lauren Jenkins  
Benetta Park Jenson  
Sarah Moore Johnson  
W. Steven Johnson  
John M. Jolley  
Kim Kamin  
Emily Kembell  
Catherine Hood Kennedy  
Stanley C. Kent  
Curtis Kimball  
Robert K. Kirkland  
Carol Cioe Klyman  
James D. Lamm  
William R. Lane, Jr.  
James J. Lanham  
Lucinda Lee  
Kristen M. Lewis  
Albert L. Lingelbach  
Stephanie Loomis-Price  
Robert D. LoPrete  
Christin P Lovegrove  
Franklin Malemud

Thomas N. Masland  
Ruth Mattson  
C. Kevin McCrindle  
Howard M. McCue, II  
Judith W. McCue  
William J. McGraw, II  
Deborah O. McKinnon  
W. Deryl Medlin  
Amy Michaud  
John T. Midgett  
Steven K. Mignogna  
Justin T. Miller  
M. Elizabeth Monihan  
Karen M. Moore  
Peter T. Mott  
G. Barton Mowry  
William G. Murray  
Jeffrey N. Myers  
Barry A. Nelson  
Michel W. Nelson  
Jeanne L. Newlon  
Holly B. Norvell  
Colleen D. O'Connell  
Duncan E. Osborne  
J. Lee E. Osborne  
Jeffery T. Peetz  
Natalie M. Perry

Christine Piersall  
Tara Anne Pleat  
David Pratt  
Mary F. Radford  
Nancy B. Reimann  
Lisa M. Rico  
Louisa Ritsick  
John T. Rogers, Jr.  
Alan F. Rothschild, Jr.  
Andrew D. Rothstein  
Daniel S. Rubin  
Deborah L. Russell  
Margaret E.W. Sager  
Lynn B. Sassin  
Kathleen R. Sherby  
Jennifer Shirkey  
Roger L. Shumaker  
Barbara A. Sloan  
David Scott Sloan  
David C. Sojourner, Jr.  
Kurt A. Sommer  
James D. Spratt, Jr.  
Lois Ann Stanton  
Alfred J. Stashis  
Peter S. Stern

C. Jean Stewart  
Bruce C. Stockburger  
Kimberly H. Stogner  
Nina B. Stryker  
Frederick J. Tansill  
Jeffrey C. Thede  
Patrick D. Timmer  
Angela Titus McEwan  
Rebecca Ellen Vandall  
Mary E. Vandenack  
Jayna M. Voss  
James R. Walker  
Suzanne Walsh  
Christopher J. Ward  
Melvin A. Warshaw  
Elizabeth E.W. Weinewuth  
Dirk A. Williams  
Melissa J. Willms  
Daniel J. Wintz  
Leonard J. Witman  
Alexander Wolf  
Lauren Wolven  
Glen A. Yale  
Dan C. Young  
Diana S.C. Zeydel

## 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, 901 15th Street, NW, Suite 525, Washington, DC 20005. Be sure to include where any acknowledgement should be sent.

**Amazon Smile** – Select The ACTEC Foundation as your beneficiary when you are shopping on [smile.amazon.com](https://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](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.

**Planned Giving** – Contact James D. Spratt, Jr., Esq. at (404) 523-3018 or [jimspratt@bowdenspratt.com](mailto: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 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.

## ACTEC FOUNDATION STAFF

**ACTEC Foundation**  
901 15th Street, NW  
Suite 525  
Washington, DC 20005  
T: (202) 684-8460  
F: (202) 684-8459  
[actecfoundation.org](https://actecfoundation.org)

**President**  
Jeffrey C. Thede  
(503) 416-6150  
[jeff.thede@thede-culpepper.com](mailto:jeff.thede@thede-culpepper.com)

**Executive Director**  
Deborah McKinnon  
(202) 684-8460  
[domckinnon@actec.org](mailto:domckinnon@actec.org)

**Membership and Foundation Director**  
Amy Michaud  
(202) 684-8453  
[amy.michaud@actec.org](mailto:amy.michaud@actec.org)

**Controller**  
Deborah Oberst, CPA  
[debbie.oberst@actec.org](mailto:debbie.oberst@actec.org)  
(202) 684-8460

**Communications and Outreach Director**  
Rebecca Vandall  
[rebecca.vandall@actec.org](mailto:rebecca.vandall@actec.org)  
(202) 465-8270