



President's Message

Welcome to fall! At the 2023 Fall Meeting of The ACTEC Foundation Board of Directors, the Board will be focusing on the purpose and goals of The ACTEC Foundation, reviewing The Foundation's mission statement to make

sure it aligns with current grantmaking and other activities and vice versa. Many of the Foundation's Committees met in advance of the Board meeting to discuss this initiative, and I look forward to a robust discussion of how The Foundation may have the best impact on the future of trust and estate education, communications, and community service.

In related news, I am pleased to share that the winners of the 2023 Mary Moers Wenig Student Writing Competition have been announced. Please review the article in the newsletter for the details on these talented future leaders in the trust and estate field. This annual legal writing competition encourages law students to create scholarly works in the area of trusts and estates. On behalf of The ACTEC Foundation's Board of Directors, I offer thanks to **T. Randolph ("Randy") Harris** and his panel of judges for their hard work.

As we approach the end of 2023, all ACTEC Fellows should have received their All-College Campaign mailing to support the grantmaking of which we are all so proud. At the Board of Directors meeting, we will consider several

grants, including a grant for the ninth class of Dennis I. Belcher Young Leaders. To date, twelve graduates of the Dennis I. Belcher Young Leaders Program have been elected as ACTEC Fellows! The Board will also consider a grant to continue support for *ACTEC Trust and Estate Talk*, the widely subscribed-to podcast series produced by ACTEC's Communications Committee, as well as *ACTEC Estate Planning Essentials*, the video series designed to educate families and professionals about estate planning. Several other grants are up for consideration as well. The Foundation's Board meetings are open to guests; all ACTEC Fellows are invited to attend. I hope that by attending, Fellows will appreciate the work of The Foundation and support the All College Campaign by donating.

A thoughtful way to support The ACTEC Foundation is to make a memorial contribution to honor a Fellow we have lost. All such memorial gifts are tax-deductible and are acknowledged to the family of the deceased. You may also support the Rudy L. Ogburn Memorial Fund for the Southeast Fellows Institute by donating in Rudy's memory.

Your donation supports the trust and estate field in so many ways—I hope you will join me in making a **year-end gift**.

Yours sincerely,

John T. Rogers, Jr.

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2023 Mary Moers Wenig Student Writing Competition

Winners Announced!



First Place
Aaron Anderson

Brigham Young University
J. Reuben Clark
Law School



Second Place
Ryan D. Tosto

Arizona State University
Sandra Day O'Connor
College of Law



Honorable Mention
Katie Giron

Maurice A. Deane
School of Law at
Hofstra University

The ACTEC Foundation announced the winners of the 2023 Mary Moers Wenig Student Writing Competition on Tuesday, September 26. Three submissions from law students distinguished themselves among entries received from students attending the following law schools:

- Arizona State University Sandra Day O'Connor College of Law
- Brigham Young University J. Reuben Clark Law School
- Campbell University Law School
- Louisiana State University Paul M. Hebert Law Center
- Loyola University Chicago School of Law
- Maurice A. Deane School of Law at Hofstra University
- Pepperdine Caruso School of Law

T. Randolph Harris, who Chaired the Panel Judges, shares: "As is the case every year, the selected papers were outstanding, and reflected novel approaches to thorny trust & estate issues." The Foundation congratulates the winners and expresses gratitude to all students who participated!

The winners share their thoughts:

1st Place:

Resolving Unfairness in a Fair Way: How the Grantor Trust Rules Should be Reformed

"What an honor it is to be selected as the winner of the 2023 Mary Moers Wenig Student Writing Competition! I thank Professor Rust Tippet for encouraging me to submit my article. I hope it contributes to the ongoing conversation about reforming the grantor trust rules." - Aaron Anderson

2nd Place:

Unpacking the Digital Vault: Estate Planning Considerations for Non-Fungible Tokens

"My heartfelt thanks go out to the panel of judges and the staff for this recognition. I hope my paper serves as a valuable resource, shedding light on the issues specifically relevant to NFTs and digital assets in the area of trusts and estates." - Ryan Tosto

Honorable Mention:

Frozen Embryo Disposition After Death and Dobbs: Applying Testamentary Guardianship for Embryos in 'Personhood' States

"I am grateful to be awarded an honorable mention in the 2023 Mary Moers Wenig Writing Competition. I hope my article will spark a conversation about the implications of granting 'personhood' status to cryopreserved embryos in the field of trust and estate law." - Katie Giron

Denise I. Belcher Young Leaders Elected During The 2023 Annual Meeting

The **Dennis I. Belcher Young Leaders Program** was designed to foster scholarship and education in trust and estate matters, promote diversity and inclusivity, and to 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. The ACTEC Foundation is proud to support the Dennis I. Belcher Young Leaders Program. To date, twelve graduates of the Dennis I. Belcher

Young Leaders Program have been elected as ACTEC Fellows. Most recently, **Caitlin Noble Horne** (DIB Young Leader 2021-2023) and **Jordan Daniel Veurink** (DIB Young Leader 2019-2021) were elected at ACTEC's 2023 Annual Meeting in New Orleans, LA. Caitlin received her JD from the University of South Carolina School of Law in 2010, and her LLM from Georgetown University Law Center in 2012. She is a North Carolina Board Certified Specialist in estate planning and probate law and is a member of Moore & Van Allen's Wealth Transfer Group in Charlotte, NC. Jordan is a 2012 graduate of The Texas A&M University School of Law where he received his JD, and is currently with Ballard Spahr LLP in Sioux Falls, SD. The ACTEC Foundation congratulates Caitlin and Jordan and welcomes them into the College!



Dennis I. Belcher



Caitlin Nobles Horne

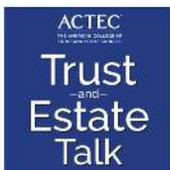
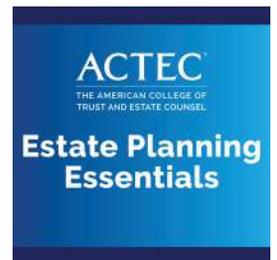


Jordan Daniel Veurink

The ACTEC Family Estate Planning Guide is now **ACTEC Estate Planning Essentials!**

The Foundation-funded *ACTEC Estate Planning Essentials* video series continues to offer timely T&E advice from ACTEC Fellows to the general public. Recently, the series funded the *Should I Serve* series, to help individuals make informed decisions on serving as an agent under a Financial or Healthcare Power of Attorney, serving as a trustee, or serving as an executor.

Fellows are invited to visit and share **the video library** with their clients and professional network! Keep an eye out for upcoming videos and visit actec.org/share to add them to your company website.



Celebrating Over 500,000 Downloads!

PODCAST

The ACTEC Foundation has provided the funding to produce over 270 Trust and Estate Talk podcasts that have been downloaded over 500,000 times!

This could not have been done without your support.

THANK YOU!

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Thank you to all of the Fellows who have supported The ACTEC Foundation from June 6 through September 20, 2023!

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ACTEC
FOUNDATION

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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 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.

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@djuricspratt.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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