



President's Message

At this 2024 Annual Meeting, The ACTEC Foundation's Board of Directors will continue to focus on the purpose and goals of The ACTEC Foundation, reviewing The Foundation's mission statement and Bylaws to ensure that

our governing statement and documents best express the purposes for which our Foundation was formed and continues to exist. The Grant Committee and the Planning and Governance Committee have held several joint meetings since the Board's last meeting in October, and I look forward to continued progress as purposeful discussion continues in Phoenix. Both Committees, as well as the full Board, are committed to forging a path for The Foundation to have the most impactful effect on the future of the trust and estate practice.

As we look to the future of the trust and estate practice, I am proud to report that the Ninth Class of Dennis I. Belcher Young Leaders has been welcomed to the College. I encourage you to read the full article, elsewhere in this newsletter, on these up-and-coming leaders. This program is a hearty reminder of how your donations are having an immediate and positive impact on the future of the trust and estate profession. To date, twelve graduates of the Dennis I. Belcher Young Leaders Program have been nominated and elected as ACTEC Fellows, a fact of which we can all be rightly proud. Many thanks to T. Randolph

(Randy) Harris for his work on this program on behalf of ACTEC's Diversity, Equity, and Inclusivity Committee.

I am pleased to report that The Foundation's All College Campaign was a great success, raising nearly \$90,000 to support The Foundation's grant making. My heartfelt thanks to all of you who joined me in making a year-end gift to The ACTEC Foundation to ensure The Foundation's continuing ability to provide funding for worthy projects. Please take a moment to review the list of donors since the Fall 2023 meeting included in this newsletter. If you see someone wearing a blue Foundation Donor ribbon on their name badge while attending the Annual Meeting, please take a moment to thank them for their support. And, if you don't yet have a ribbon, there's still time to earn one. The blue-ribbon fundraising campaign continues at the meeting. Make a donation - large or small. Look for the Foundation booth during seminar breaks or see me or Amy Michaud any time.

Finally...drum roll please! The Foundation announces The Longest Drive Challenge 2024! Last year's Longest Drive Challenge was so much fun we decided to bring it back! Look for announcements coming in the *Weekly Update* and get ready to support your favorite golfer as, in the words of pro golfer John Daly, they "just grip it and rip it!"

Yours sincerely,

John T. Rogers, Jr.

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The ACTEC Foundation
is Proud to Announce
**THE 2023-2025
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On February 7, 2024, ACTEC Foundation President, John T. Rogers, Jr., and Chair of ACTEC's Diversity, Equity & Inclusivity Committee, Cynthia G. Lamar-Hart, announced the Ninth Class of Dennis I. Belcher Young Leaders. John Rogers extended his congratulations to the recipients:

"I am delighted to extend a warm welcome to the esteemed members of this new Dennis I. Belcher Young Leaders class. These four exceptional individuals represent excellence in the trusts and estates arena, and we are thrilled to have them as integral members of our program for the upcoming two years. I congratulate each of them."

The Dennis I. Belcher Young Leaders Program fosters scholarship and education in trust and estate matters while promoting diversity, equity, and inclusivity. Initiated in collaboration with the American Bar Association Real Property, Trust and Estate Law Section (RPTE) Fellows program, it provides graduates of the RPTE program an opportunity to extend their participation in RPTE leadership activities through financial support. Named after Dennis I. Belcher, ACTEC President 2009–2010, the program honors his legacy as a leader and mentor. Since 2015, twelve Dennis I. Belcher Young Leaders have been elected to the College. The Foundation joins John in congratulating the recipients!

ACTEC Foundation Donors

Thank you to all of the Fellows who have supported The ACTEC Foundation from September 21, 2023 through January 30, 2024!

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MARY MOERS WENIG STUDENT WRITING COMPETITION

DEADLINE: JUNE 30, 2024

Area and Topics: The paper must relate to the area of trusts and estates, broadly defined. Any one or more of the following topics are appropriate for discussion:

- Business Planning
- Charitable Planning
- Elder Law
- Employee Benefits
- Fiduciary Accounting
- Fiduciary Administration
- Fiduciary Income Taxation
- Fiduciary Litigation
- Estate Planning and Drafting
- Professional Responsibility
- Substantive Laws for the Gratuitous
- Transmission of Property
- Wealth Transfer Taxation (Estate, Gift and GST Tax)

1st Prize

A Full Tuition Scholarship to the Heckerling Graduate Program in Estate Planning at the University of Miami School of Law for the 2024-2025 or 2025-2026 academic year (candidates must apply and be admitted as full-time students to be considered for the scholarship), \$5,000 award and publication in the *ACTEC Law Journal*.

2nd Prize

\$3,000 award, online publication on the ACTEC Foundation's website, and possible publication in the *ACTEC Law Journal*.

3rd Prize

\$1,000 award, online publication on the ACTEC Foundation's website, and possible publication in the *ACTEC Law Journal*.

Visit actecfoundation.org/law-student-writing-competition to find out more.

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Contributions from September 21, 2023 to January 30, 2024

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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 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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