



President's Message

I hope everyone has had a pleasant summer! I am settling into a new office, but found time to enjoy the summer as well, and I hope your summer brought a time of rest and renewal as we move into the fall season of change.

The Foundation's Board is looking forward to this season of change. I anticipate that at our fall meeting, the Board will finalize a new Mission Statement, giving new life to the charitable purpose of the work we do. Our new mission will inform everything The Foundation does, from grant making to The Foundation's redesigned website, which we will soon introduce. You will see the impact of some of our grant making in this newsletter.

First, look for an article on the upcoming George Mason University (GMU) Antonin Scalia Law School **Trust and Succession Law Workshop** which is funded by an ACTEC Foundation grant. Inspired by ACTEC's own Professor Tom Gallanis, this new workshop offers eleven scholars, writing on a variety of trust and estate topics, the opportunity to have their scholarly work reviewed earlier in the writing process. The Foundation is pleased to be able to sponsor this workshop, which will take place November 1-2, 2024, to support academics in the trust and estate field, and looks forward to an update from Professor Gallanis after November.

Another Foundation-funded educational resource featured in this edition is an important *ACTEC Trust & Estate Talk* podcast presented by ACTEC Regent Dana Fitzsimons. In

July, Dana recorded "**The NextGen Bar Exam Threats to Wills and Trusts,**" in which he discussed ACTEC's efforts to keep trust and estate topics on the NextGen Bar Exam. The Foundation is proud to support ACTEC's critical message for including trusts and estates as foundational subject matter on the NextGen Bar Exam. With over 500,000 downloads to date, the podcast series reaches a wide audience, delivering trust and estate news and information demonstrating the expertise of ACTEC Fellows.

The Foundation's Board looks forward to working with the College's Legal Education Committee and Long Range Planning Committee as they seek ways to ensure that law schools continue to teach trust and estate law. Trust and estate law impacts everyone, and having highly qualified attorneys practicing in this area is a worthwhile goal for the College and The Foundation to pursue together. If you have ideas to further this goal, please bring them to the fall meeting, or to the attention of any Foundation Board member.

And remember, your donation to The ACTEC Foundation helps us fund important programs like *ACTEC Trust & Estate Talk* podcasts and the workshop at GMU. **Please donate today** to support this work!

Yours sincerely,

John T. Rogers, Jr.

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ACTEC Foundation Supports NextGen Bar Exam Call to Action

The NextGen Bar Exam Threats to Wills and Trusts

In July, *ACTEC Trust and Estate Talk* lent a hand to the call to action for wills and trusts to be reinstated on the NextGen Bar Exam.

ACTEC Regent **Dana G. Fitzsimons, Jr.**, shared the detrimental impact of the National Conference of Bar Examiner's removal of wills and trusts from the NextGen Bar Exam in **"The NextGen Bar Exam Threats to Wills and Trusts."**

In the podcast, Dana urged, "We all need lawyers that are competent in wills and trusts. It's one of the most universal legal needs there is. It's personal. It impacts every ethnic, cultural, and economic walk of life."



ACTEC Foundation Supports Trust and Succession Law Workshop at Antonin Scalia Law School



The Foundation approved a grant proposal submitted by Academic Fellow **Thomas (Tom) P. Gallanis**, providing \$12,800 in funding for a **Trust and Succession Law Workshop** organized by the Global Wealth Management Project at the Antonin Scalia Law School of

George Mason University, in Arlington, VA (the Workshop). Scheduled for November 1-2, 2024, the Workshop aims to foster scholarly discourse and provide valuable feedback on research in progress within the field of trusts and estates. The Workshop's format is designed to maximize constructive critique and collaboration. Draft papers from participating scholars will be circulated in advance, ensuring that all participants are well prepared for in-depth discussions. Each paper will be allotted 45 minutes, with the author providing a brief introduction before opening the floor to feedback from peers.

Tom Gallanis explains, "Distinct from the biennial Symposium sponsored by The ACTEC Foundation, which focuses on a specified theme, this Workshop offers an opportunity for trusts and estates scholars to engage with each other's research in progress on a wide range of topics. Scholars in the T&E field often have no or few colleagues on their own faculties who can provide meaningful feedback on research in progress. The Workshop brings together a diverse group of T&E scholars to enhance the quality of each other's scholarly research. The ACTEC Foundation's support underscores the importance of fostering early-stage academic collaboration, ensuring that the very best scholarship is produced in the T&E field. I am very grateful to The Foundation for the generous support and look forward to a successful event."

The Workshop participants and their research topics can be found at: globalwealth.law.gmu.edu/conferences-and-workshops/.

The Entire 2016–2018 Class of Dennis I. Belcher Young Leaders Has Been Elected to the College!

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, this program 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.

To date, 14 participants in the program have been nominated and elected to ACTEC. Of the 14, five constitute a complete class—the 2016–2018 class of Dennis I. Belcher Young Leaders has been nominated and elected to ACTEC in its entirety! The class consists of:



Marissa Dungey, Dungey Dougherty PLC, Greenwich, CT. Marissa serves as a member of the Practice Committee.



Chasity Grice, The Estate and Family Law Group, Memphis, TN. Chasity serves on The Foundation's Board of Directors; as a member of The Foundation's Grant Committee; and as a member of the Membership Selection Committee.



Toni Ann Kruse, McDermott, Will & Emery, LLP, New York, NY. Toni Ann serves as a member of the Business Planning Committee, the Communications Committee, the FATF Task Force, the Fiduciary Administration Committee, and the New Fellows Steering Committee.



Jonathan (JP) P. Lee, Sojourner, Caughman & Thomas, LLC, Columbia, SC. JP serves as ACTEC's Tennis Coordinator, as a member of the Institute Steering Committee, the Practice Committee, and the Professional Responsibility Committee.



Raj A. Malviya, Miller Johnson, Grand Rapids, MI. Raj serves as a member of the FATF Task Force, the Fiduciary Income Tax Committee, and the International Estate Planning Committee, and as State Chair for Michigan.

If you see these accomplished ACTEC Fellows at an ACTEC meeting, please take a moment to congratulate them! And remember to support The ACTEC Foundation so it can continue to support programs like the Dennis I. Belcher Young Leaders Programs that build ACTEC's future!

The Annual All College Fundraising Campaign

ACTEC Fellows, please watch for the Annual All College Fundraising Campaign Letter. It will be arriving in your mailbox in early November.

As you are planning your year-end giving, please make the All College Campaign a part of your annual plan. This important campaign helps The ACTEC Foundation fund the trust and estate initiatives that are so critical to our profession. *ACTEC Trust and Estate Talk*, the weekly podcast that so many ACTEC Fellows and other trust and estate professionals rely on for cutting-edge information about trending topics, are funded by a grant from The ACTEC Foundation—and YOUR donations make this grant possible! The *ACTEC Estate Planning* videos, created for Fellows to share with their colleagues and clients, provide the information individuals need to know when creating their estate plans, and the benefits of utilizing a skilled trust and estate attorney, are funded by a grant from The ACTEC Foundation. Again, YOUR donations make this grant possible!

Do you value free access to SSRN's *Wills, Trusts, & Estates Law eJournal*? Did you know it's supported by a grant from The ACTEC Foundation? Do you cheer every time a Dennis I. Belcher Young Leader is elected to the College and recognize them as future leaders? Yes, the Dennis I. Belcher Young Leaders Program is funded by a grant from The ACTEC Foundation!

When you receive that All College Campaign Letter in November, **please make a point** to give generously to support these programs and so many others.

And if you'd like to support these programs right away, you may do so [here](#).

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Thank you to all of the Fellows who have supported The ACTEC Foundation from June 7 through August 13, 2024!

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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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