

## INSIDE

- 2** Student Writing Competition Announcement
- 3** 2018-2020 Young Leaders Program
- 4** Family Estate Planning Guide

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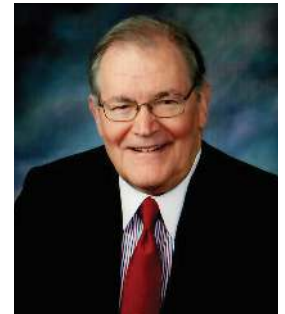
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## President's Message



Welcome to the Fall 2018 ACTEC Foundation newsletter. The Foundation's Board of Directors and I thank you for your continued support throughout the year.

We are pleased to report on several initiatives funded by the ACTEC Foundation. Please note the article on page 2 to read more about the First, Second and Third Place Winners of the 2018 ACTEC Foundation-sponsored Mary Moers Wenig Student Writing Competition. The Foundation is proud of all of the winners and all of the other entrants whose scholarship in the trust and estate discipline is encouraged by the ACTEC Foundation.

In September 2018, the ACTEC Foundation and the College welcomed the fourth class of Dennis I. Belcher Young Leaders. This program, funded by the ACTEC Foundation and named in memory of beloved College leader Dennis I. Belcher, is designed to foster scholarship and education in trust and estate matters, promote diversity and inclusivity, and encourage the development of potential ACTEC Fellows.

The Foundation is anticipating the outcome of a recently funded matching grant to the University of New Mexico. This grant will establish a very important ACTEC Foundation-funded research project: The Research Project in Trust and Estate Planning Services for Rural and Underserved Populations. This will be focused on developing critical data around the unique trust and estate planning needs of rural and/or underserved populations, to include and place special focus on the specific needs of Native Americans and their communities through the work of a dedicated post-graduate research fellow.

If you have not already done so, please subscribe to The ACTEC Trust and Estate Talk Podcast on [iTunes](#), [Stitcher](#), [SoundCloud](#), [Spotify](#), [Google Play](#) or your favorite podcast player. The Podcasts, funded by the ACTEC Foundation, discuss the latest trends and issues in trust and estate law. They are free to the public.

I look forward to sharing more about the success of ACTEC Foundation funded research initiatives and other projects in the next newsletter. Your ongoing support makes these worthwhile projects possible.

Sincerely,

L. Henry Gissel, Jr.  
President, ACTEC Foundation

## Competition Announcement!

### The 2018 Mary Moers Wenig Student Writing Competition Winners



First-place Winner  
Nicole M. Paschoal



Second-place Winner  
Courtney Bravo



Third-place Winner  
Amanda Leckman

The ACTEC Foundation is pleased to announce the 2018 winners of the Mary Moers Wenig Student Writing Competition. A panel of judges appointed by ACTEC’s Legal Education Committee reviewed the submissions and chose the winners. The first-place winner will receive publication in the *ACTEC Law Journal* and a \$5,000 cash prize. In addition, the first-place winner may now accept a full-tuition scholarship to the Heckerling Graduate Program in Estate Planning at the University of Miami School of Law for either the 2018-2019 or the 2019-2020 academic year. The second-place winner will receive a \$3,000 cash prize and the third-place winner will receive a \$1,000 cash prize. All papers will be published on the ACTEC Foundation website.

First-place winner Nichole M. Paschoal stated: “Learning I won first prize in the ACTEC Mary Moers Wenig writing competition felt absolutely surreal. I remember feeling surprised and excited, but mostly, I felt a sense of accomplishment. Researching and writing this paper was challenging because I knew very little about the topic in advance. However, it was also one of the most fulfilling experiences in my law school career. I was inspired to write the paper as the result of sheer intellectual curiosity. I wanted to know what would happen if property bequeathed no longer existed in its same form at a testator’s death. At the time, I was working as a law clerk and something had come across

my desk that spurred my interest in the subject. I posed the question to my favorite inheritance law professor and he urged me to research the issue further. He also encouraged me to consider writing about the subject. My research uncovered dozens of cases across multiple jurisdictions dealing with the issue, but there was one case in particular where I found the result to be especially harsh. This inspired me to write about the subject, highlight the specific issue with replacement property, and attempt to craft a plausible solution. In the end, I only hope that people will enjoy reading the paper as much as I enjoyed writing it.”

*First-place Winner*

**Nicole M. Paschoal** from the University of San Diego School of Law

“The Problem of Replacement Property in the Law of Ademption”

*Second-place Winner*

**Courtney Bravo** from the University of San Diego School of Law

“Stepfamilies & Intestacy Law: A Proposal for Stepparent and Stepchild Inheritance”

*Third-place Winner*

**Amanda Leckman** from the University of San Diego School of Law

“Does Escheat Cheat Decedents?”

## 2018-2020 Dennis I. Belcher Young Leaders Program

The Dennis I. Belcher Young Leaders Program was developed to foster scholarship and education in trusts and estates, promote diversity and inclusivity, and encourage the development of potential ACTEC Fellows. In March 2018, the program was named after Dennis I. Belcher, past president, leader of the College and mentor to many young trust and estate lawyers. Participants in the Dennis I. Belcher Young Leaders Program have been offered tuition-free attendance at the ACTEC-ALI/CLE webinars, financial support to attend ABA/RPTE Section Meetings, and invitations to attend regional and state ACTEC events. We are pleased to announce this year's class of Dennis I. Belcher Young Leaders:



**Adam Ansari** of Levun, Goodman & Cohen, LLP in Northbrook, IL

Adam is completing an LLM in Taxation (2018) from the Northwestern Pritzker School of Law, with a certificate in Wealth

Transfer and Legacy Planning, and received his JD from the John Marshall Law School. He also holds an MBA from the Brennan School of Business at Dominican University and received a BA in International Relations from Boston University.



**James Dougherty** of Withers Bergman LLP in Greenwich, CT

James is a graduate of Carnegie Mellon University and the William & Mary School of Law. He assists executors

and beneficiaries alike through all aspects of the estate administration process including probate, contested estates, contentious trust litigation, tax, and post-mortem estate planning issues. In addition to helping his clients, James is a frequent author and speaker, nationally and internationally, on estate, trust, tax, and probate matters.



**Alicia Graves** of Law Offices of Alicia N. Graves in Cleveland, OH

Alicia received a BA from Case Western University and her JD from The University of Akron School of Law. She has been is

admitted to practice law before the Ohio Supreme Court as well as all local trial and appellate Courts in the State of Ohio.



**Aastha Madaan** of Madaan Law, P.C. in Irvine, CA

Aastha is a graduate of Whittier Law school and focuses her practice in the areas of business law, franchise law, and estate

planning. She often writes and speaks on the topic of cultural competency in the practice of law and is fluent in Hindi and Punjabi. Aastha also teaches legal writing and research at a local law school.



**Brandon Ross** of Pillsbury Winthrop Shaw Pittman LLP in Washington, D.C.

Brandon received his LLM in Taxation from Georgetown University Law Center in 2008; his JD from American University

Washington College of Law in 2007; and his BA in History from Cornell University in 2004. He counsels high net worth clients and their advisors on achieving client tax planning goals, implementing complex estate planning, trust and estate administration, and business succession strategies.



Consider making an end-of-year gift today to the ACTEC Foundation to support the mission of encouraging life-long learning for families, professionals and students.

[actecfoundation.org/donate](https://actecfoundation.org/donate)

## New Family Estate Planning Guide Videos in Production!

The Family Estate Planning Guide videos offers families insight into the fundamentals of wills and trusts. The initial videos, “What is a Revocable Trust and Do I Need One?” and “Understanding Power of Attorney (POA),” released in the Summer of 2016 have been viewed by thousands of individuals around the world.

The College is adding five new videos scheduled for release in 2019. The new video content will be shorter in length, produced in a conversational style, and recorded during the 2018 Fall Meeting. New topics include:

- ▶ *What is Probate?* with ACTEC Fellows Rick Gans and Phillip Baumann
- ▶ *IRA Beneficiaries.* with ACTEC Fellows Stacy Singer and Svetlana Bekman
- ▶ *What is Joint Tenancy and When Should I Use It?* with ACTEC Fellows Rick Gans and Tami Conetta
- ▶ *What is a Will and Why Do I Need One?* with ACTEC Fellows Liz Arias and Jean Gordon Carter
- ▶ *How Does a Revocable Trust Avoid Probate?* with ACTEC Fellows Stacy Singer and Jonathan Michael

## How to Contribute

The ACTEC Foundation is committed to promoting scholarship and education in trust, estate, and tax law. The ACTEC Foundation funds trust and estate programs and activities that serve those who are at risk and underserved. 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/how-to-contribute/online-contribution-form/](http://actecfoundation.org/how-to-contribute/online-contribution-form/)

**Check** – Make the check payable to “ACTEC Foundation” and mail to ACTEC Foundation, 901 15th Street, NW, Suite 525, Washington, DC 20005. Be sure to include information on where to direct the contribution.

**Amazon Smile** – Select the ACTEC Foundation as your beneficiary when you are shopping on [smile.amazon.com](http://smile.amazon.com). For eligible purchases at AmazonSmile, the AmazonSmile Foundation will donate 0.5% of the purchase price to the ACTEC Foundation.

**Annual Membership Dues** – When remitting 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 Director and Foundation Management, 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) 523-8337 or [jimspratt@bslf.com](mailto:jimspratt@bslf.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.

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