

ACTEC®

FOUNDATION

MARCH 2023 – MARCH 2026

IMPACT REPORT

Investing in the Future

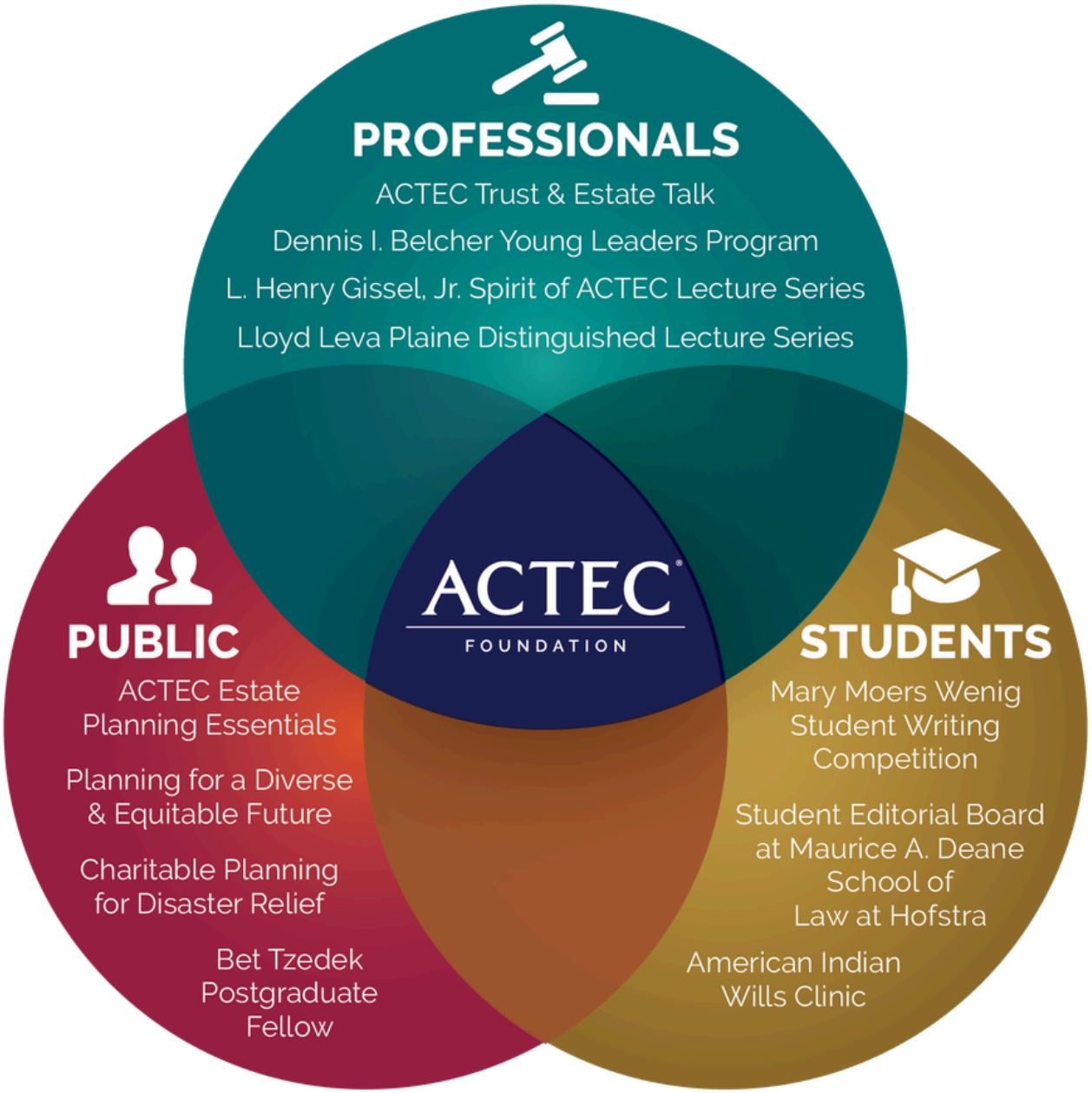
The Foundation's investments create expanding impact.

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC FOUNDATION

Mission Statement:

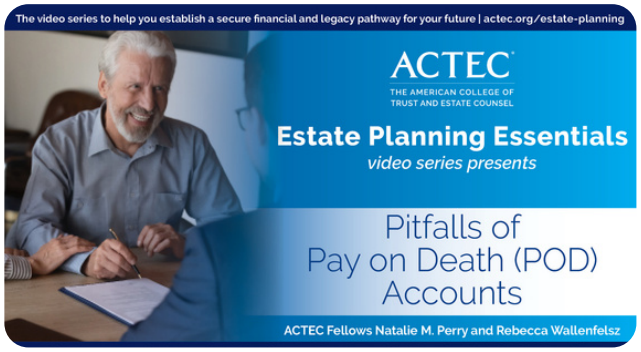
The ACTEC Foundation's mission is to promote scholarship, education, and community outreach in trust, estate, tax, charitable, and related areas of the law. The Foundation serves **professionals**, **students**, and the **public** by providing grants for an array of educational programs, widely available resources, scholarships, legal research, and scholarly writing competitions, among other activities in these areas of the law.

Key Programs and Initiatives



High Impact Moments!

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION



#1 video during period with over 14,000 views!



#1 podcast during period with over 11,900 downloads!



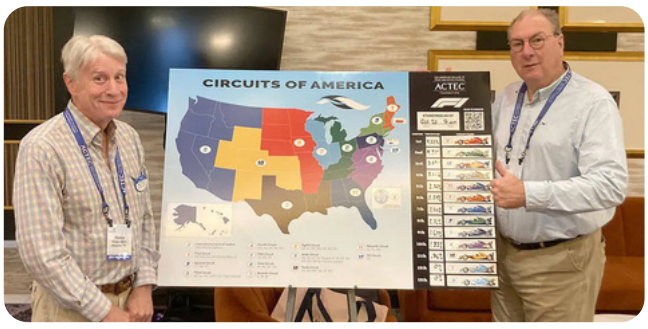
2nd L. Henry Gissel, Jr. Spirit of ACTEC Lecture.



2025 Circuits of America.



Fundraiser raised over $76,000!





Fundraiser raised over $ 53,600.00!



Sharing the Foundation's purpose & impact.

ACTEC Foundation Board as of December 31, 2025

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

The Foundation's officers and directors are committed to strengthening the Trust and Estate profession and serving the public through their dedication to the ACTEC Foundation.



President
John T. Rogers, Jr.
Glendale, CA



Vice Pres. and Co-Chair, Grant Committee
Lora G. Davis
Dallas, TX



Treasurer
T. Randolph Harris
New York, NY



Secretary and Co-Chair, Grant Committee
Kendis Key Muscheid
Phoenix, AZ



Co-Chair, Fundraising Committee
Robert K. Kirkland
Kansas City, MO

Directors
Farhad Aghdami, Richmond, VA
Brad Bedingfield, Boston, MA
Lora G. Davis, Dallas, TX
S. Gray Edmondson, Oxford, MS
Todd A. Flubacher, Wilmington, DE
Chasity Grice, Memphis, TN
Shannon G. Guthrie, Dallas, TX
T. Randolph Harris, New York, NY
Joshua E. Husbands, Portland, OR
Robert K. Kirkland, Kansas City, MO
Cynthia G. Lamar-Hart, Birmingham, AL
William P. LaPiana, New York, NY
Judy Y. Lee, Honolulu, HI
R. Hugh Magill, Minneapolis, MN
W. Cameron McCulloch, Houston, TX
Kendis Key Muscheid, Phoenix, AZ
Charles Ian Nash, Melbourne, FL
Jeanne L. Newlon, Washington, DC
Benetta Y. Park, West Palm Beach, FL
Stephanie Perry, Bethesda, MD
Michaelle D. Rafferty, Reno, NV
Bruce S. Ross, Santa Fe, NM
Alan F. Rothschild, Jr., Columbus, GA
Anita J. Siegel, Florham Park, NJ
Akane R. Suzuki, Seattle, WA

EC Liaison
Edward Jay Beckwith, Washington, DC

ACTEC Foundation Board FY 2024 & 2025

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC FOUNDATION

2024

President
John T. Rogers, Jr. | *Los Angeles, CA*

Vice President and EC Liaison
Melissa J. Willms | *Houston, TX*

Treasurer
Kathleen R. Sherby | *St. Louis, MO*

Secretary and Chair, Grant Committee
Lora G. Davis | *Dallas, TX*

Chair, Fundraising Committee
Christopher B. Hunt | *Minneapolis, MN*

Immediate Past President
Jeffrey C. Thede | *Portland, OR*

Directors
Brad Bedingfield | *Boston, MA*
David F. Edwards | *New Orleans, LA*
Theron E. Fry | *Wichita, KS*
Thomas P. Gallanis | *Arlington, VA*
Keith Bradoc Gallant | *New Haven, CT*
Peter S. Gordon | *Wilmington, DE*
Chasity Grice | *Memphis, TN*
Shannon G. Guthrie | *Dallas, TX*
T. Randolph Harris | *New York, NY*
Joseph G. Hodges, Jr. | *Denver, CO*
Christopher R. Hoyt | *Kansas City, MO*
Robert K. Kirkland | *Liberty, MO*
William P. LaPiana | *New York, NY*
W. Cameron McCulloch | *Houston, TX*
Michele A.W. McKinnon | *Richmond, VA*
Kendis Key Muscheid | *Phoenix, AZ*
Charles Ian Nash | *Melbourne, FL*
Jeanne L. Newlon | *Washington, DC*
Benetta Y. Park | *Oak Creek, WI*
Bruce S. Ross | *Los Angeles, CA*
Alan F. Rothschild | *Columbus, GA*

2025

President
John T. Rogers, Jr. | *Glendale, CA*

Vice President and Chair, Grant Committee
Lora G. Davis | *Dallas, TX*

Treasurer
T. Randolph Harris | *New York, NY*

Secretary
Kendis Key Muscheid | *Phoenix, AZ*

Co-Chairs, Fundraising Committee
David F. Edwards | *New Orleans, LA*
Robert K. Kirkland | *Kansas City, MO*

Directors
Brad Bedingfield | *Boston, MA*
Todd A. Flubacher | *Wilmington, DE*
Peter S. Gordon | *Wilmington, DE*
Chasity Grice | *Memphis, TN*
Shannon G. Guthrie | *Dallas, TX*
Christopher R. Hoyt | *Kansas City, MO*
Cynthia G. Lamar-Hart | *Birmingham, AL*
William P. LaPiana | *New York, NY*
Judy Y. Lee | *Honolulu, HI*
R. Hugh Magill | *Minneapolis, MN*
W. Cameron McCulloch | *Houston,TX*
Michele A.W. McKinnon | *Richmond, VA*
Charles Ian Nash | *Melbourne, FL*
Jeanne L. Newlon | *Washington, DC*
Benetta Y. Park | *Palm Beach, FL*
Stephanie Perry | *Bethesda, MD*
Bruce S. Ross | *Idyllwild, CA*
Alan F. Rothschild | *Columbus, GA*
Anita J. Siegel | *Florham Park, NJ*

Message From John T. Rogers, Jr. Foundation President 2023-2026

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION



As Immediate Past President of the ACTEC Foundation, it is my pleasure to present this introduction to the Inaugural President's Report. Serving as President of the Foundation for the past three years has been both a great honor and a profoundly rewarding experience. I am grateful for the dedication of the members of the Foundation's Executive Committee and its Board, the Committee Chairs and Committee Members, and of course the wonderful staff, all of whom worked with me over these last three years to ensure the success of everything the Foundation set out to do.

In this Report, you will see the record of this success. I look back on the past three years with tremendous pride in our accomplishments: the successful fundraisers, which not only raised funds to support grant-funded programs, but were also good fun; the student programs the Foundation supported; the professional trust and estate education the Foundation provided; and the valuable information the Foundation made available to the general public. This Report highlights the Foundation's efforts to fulfill its mission, which is to promote scholarship, education, and community outreach in trust, estate, tax, charitable, and related areas of the law. The Foundation serves professionals, students, and the public by providing grants for an array of educational programs, widely available resources, scholarships, research, and scholarly writing competitions, among other activities in these areas of the law.

In 2025, the Foundation completed a major upgrade of its website. Everything about the website was redone, with updated features including easy access to guidelines for submitting a grant, comprehensive information about the programs the Foundation supports, a visual timeline of the Foundation's history, and much more. Every detail of the Foundation's website was carefully reviewed and renewed, and that effort continues today, with new pages being added regularly. The website is often the first way that members of the public "meet" the ACTEC Foundation, so it's important that the website be inviting and well organized. I believe the new website achieves that.

And I would be remiss if I did not say THANK YOU to our donors! The Foundation's donors make every bit of our work possible. Over the last three years, the Foundation has raised almost $350,000 to support its mission. Donors are the reason the Foundation is able to provide grant funding to support the incredible programs you will read about in this Report.

The great impact the ACTEC Foundation makes in the lives of students, trust and estate professionals, and the public appears throughout these pages. All of you make it possible. Thank you—every one of you—for your support over the last three years. It would have been impossible without you.

Finally, once you've read this report, I hope you will be moved to make a donation to enable the ACTEC Foundation to continue its valuable work.

With very best wishes,
John T. Rogers, Jr.
Immediate Past President

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

Programs for Trust and Estate Professionals

DIB Young Leaders—Mentoring Promising T&E Attorneys

The Dennis I. Belcher Young Leaders Program is designed to foster leadership in the trust and estate field, 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, it provides successful trust and estate graduates of the two-year RPTE program with an opportunity to extend their participation in RPTE leadership activities for an additional two years through the financial support of The ACTEC Foundation.

Young Leaders Elected to ACTEC Fall 2023–Fall 2025

Adam M. Ansari
Preston C. Demouchet
Carly Doshi
James Ian Dougherty
Lisa Goodrich Page
Kelly M. Perez

Award-Winning Podcast Series for Wealth Management Professionals

ACTEC Trust & Estate Talk

The ACTEC Trust and Estate Talk podcast series is an educational resource that makes complex estate planning topics accessible to a broad audience. Since its launch in February 2018, the podcast has featured ACTEC Fellows sharing expert insights on a wide range of timely issues, including electronic wills, cryptocurrency and bitcoin, opportunity zones, estate planning strategies, and emerging legal developments. With more than 800,000 downloads, the series has become a valuable source of trusted information, helping listeners better understand trust and estate issues and make more informed financial and planning decisions.

Lloyd Leva Plaine Distinguished Lecture Series

Lloyd Leva Plaine was an accomplished Washington, D.C., estate planning attorney who died too young on February 2, 2010. Her many friends and colleagues formed the Lloyd Leva Plaine Memorial Fund at the ACTEC Foundation to establish a Lecture Series in her honor. The lectures recognize and celebrate Lloyd's commitment to her profession and to perpetuate the spirit, interests, standards, and contributions reflected in her life. The ACTEC Foundation supports this biennial lecture series, which is held in her memory during the Heckerling Institute on Estate Planning.

Taking Care of Business: New Approaches to Business Succession Planning

The 2025 Lloyd Leva Plaine Distinguished Lecture featured guest speaker Natalie Reitman-White and ACTEC Fellow Ellen K. Harrison. Their presentation explored the use of purpose trusts to preserve the founder's mission, including potential challenges and benefits, with insights on why business owners are choosing to use purpose trusts.




Natalie Reitman-White (L) presented with ACTEC Fellow Ellen K. Harrison (R)



2025 L. Henry Gissel, Jr. Spirit of ACTEC Lecturer Ann Burns with Foundation President John T. Rogers, Jr.

L. Henry Gissel, Jr. Spirit of ACTEC Lecture

The L. Henry Gissel, Jr. Spirit of ACTEC Lecture honors the life and legacy of Henry Gissel, a respected attorney, leader, and mentor whose nearly five decades of service helped shape ACTEC and the ACTEC Foundation. Presented every other year, the lecture features distinguished speakers who reflect on the ethical, professional, and collegial values that define excellence in the practice of law. The series celebrates his enduring commitment to integrity, mentorship, and service while encouraging thoughtful discussion about the responsibilities lawyers have to their clients, their profession, and one another. On March 21, 2025, Ann B. Burns presented the second lecture, "Minnesota Nice: Collegiality in Today's Trust and Estate Practice."

Resources for Law Students

Mary Moers Wenig Student Writing Competition



The ACTEC Foundation proudly sponsors this annual legal writing competition to inspire and recognize scholarly excellence in trust and estate law. The competition is open to J.D. and LL.M. students enrolled in ABA-accredited U.S. law schools, including those who were enrolled within 90 days prior to submission, providing an opportunity for emerging legal scholars to contribute to the field through original research and writing.

ACTEC Law Journal—Student Editorial Board at Maurice A. Deane School of Law at Hofstra



Since 2010, the Foundation has partnered with ACTEC to provide annual funding for the Student Editorial Board at Hofstra University's Maurice A. Dean School of Law, giving law students valuable hands-on experience in the journal's editorial process. Through article review, editing, and publication work, students develop critical legal writing, analytical, and leadership skills while gaining exposure to the trust and estate field.

Now in its third decade, the program continues to advance the Foundation's mission of fostering education and cultivating the next generation of trust and estate professionals.

Grant for Oklahoma City University's Advances American Indian Wills Planning Clinic in 2024

A grant from the ACTEC Foundation is helping Oklahoma City University School of Law's American Indian Wills Clinic (AIWC) expand estate planning services for Native Americans while providing law students with advanced practical experience.

OKLAHOMA CITY UNIVERSITY SCHOOL OF LAW
American Indian Wills Clinic

Beginning in the Spring of 2024, five students from the Wills Clinic continued into the Advanced American Indian Wills Clinic, where they are working directly with clients and gaining experience with the unique legal issues affecting tribal communities. The students have completed nine client intakes representing six tribes and are drafting wills during scheduled clinic hours. Their coursework also includes working through a Choctaw probate involving restricted tribal property, attending tribal court hearings, and studying the differences between tribal and federal Courts of Indian Offenses.

Since opening in 2009, the Clinic has served more than 1,300 clients and executed more than 1,050 wills, along with powers of attorney, medical advance directives, and Transfer on Death Deeds. The ACTEC Foundation's support is helping the Clinic expand its important work while preparing future attorneys to better serve Native communities.

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC FOUNDATION

Trusted Estate Planning Information for the Public

ACTEC Estate Planning Essentials

ACTEC Estate Planning Essentials

ACTEC Estate Planning Essentials, the College's public education video series, provides reliable, expert guidance from ACTEC Fellows on estate planning topics ranging from wills and trusts to tax planning, probate, and advance medical directives.

Since launching in 2016, 92 videos have generated more than 160,000 YouTube views, and the series attracted more than 258,000 website visits between 2024 and 2026. By making complex legal topics accessible and practical, Estate Planning Essentials helps individuals and families make informed decisions and plan for the future.

Bet Tzedek Postgraduate Fellow for Equity in Trust and Estate Law

The ACTEC Foundation supports Bet Tzedek, a nonprofit organization providing free legal services to low-income and vulnerable communities in Los Angeles. Bet Tzedek specializes in elder law, homeowner protection, and foreclosure prevention—critical areas for many low-income homeowners.

For these clients—often older adults and people of color—the family home is typically their most significant asset. Without estate planning, their homes may be lost to probate costs. This loss perpetuates intergenerational poverty and declining homeownership rates in Black, Indigenous, and People of Color (BIPOC) communities.

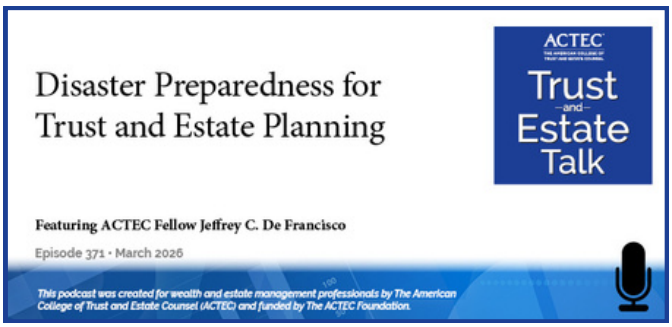
The ACTEC Foundation's grant will add to other funding streams to support Bet Tzedek's Postgraduate Fellow for Equity in Trust & Estate Law, who provides free estate planning services to qualifying homeowners.

Charitable Planning for Disaster Relief—A Guide for Attorneys and Charitable Organizations



The ACTEC Foundation's Disaster Preparedness initiative helps communities recover and rebuild after disasters by making trusted information and resources more accessible. Through this program, the Foundation provides guidance on effective ways to support disaster survivors through charitable giving and relief efforts, helping donors, nonprofit organizations, and community leaders maximize the impact of their assistance. By promoting best practices and connecting stakeholders with valuable resources, the program strengthens disaster response efforts and helps ensure aid reaches those who need it most during times of crisis.



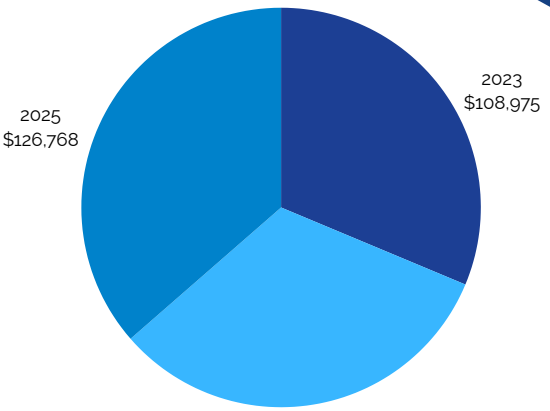


Fundraising Successes

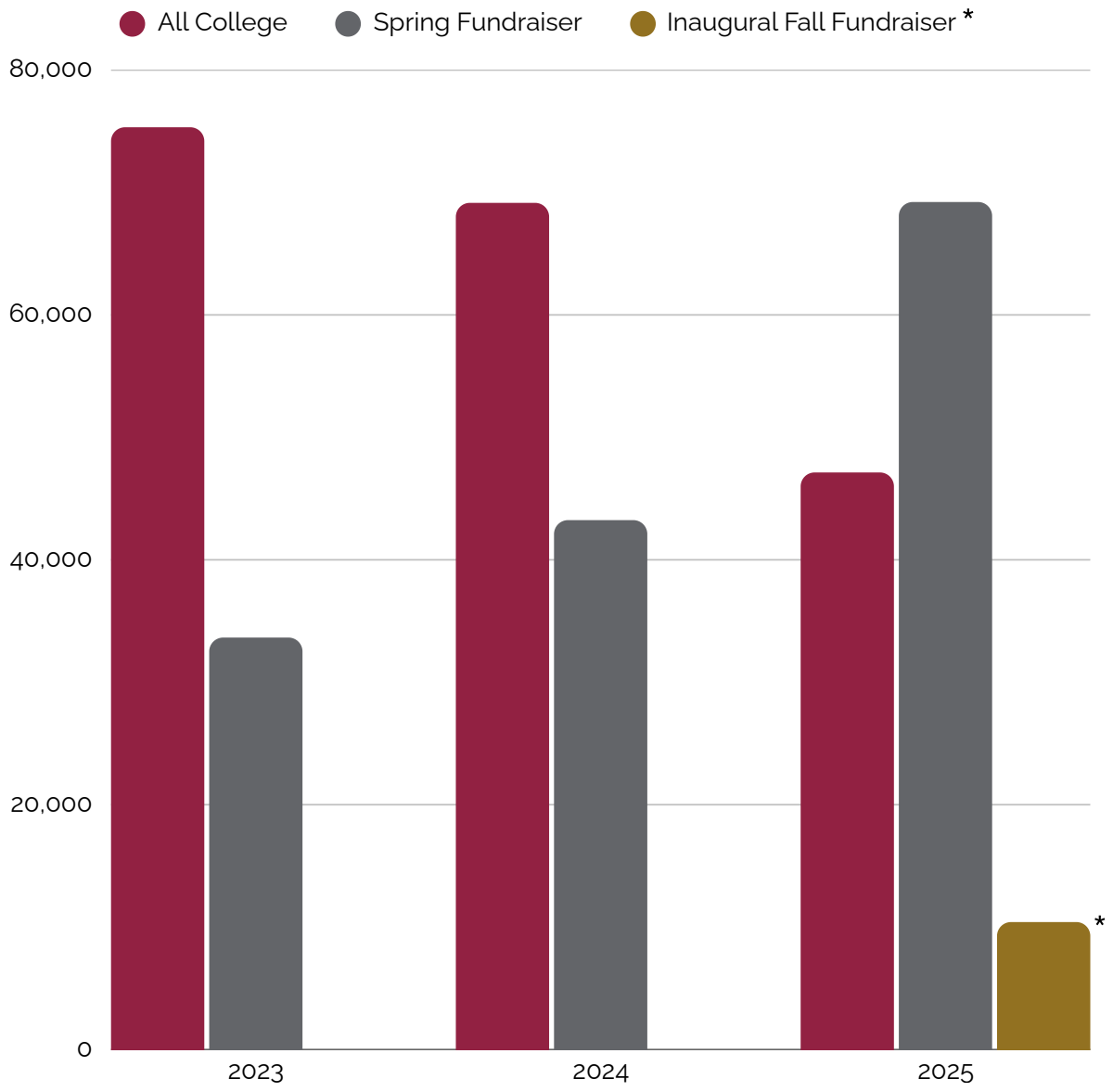
THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC FOUNDATION

The All College Campaign is the Foundation's annual end-of-year fundraising drive. Traditionally sent via mail, the campaign highlights the contributions the Foundation makes to the trust and estate profession through its thoughtful grant-making, made possible through generous donations. It's an annual opportunity to reflect on the impact our donors have on students, professionals and the general public through their gifts to the Foundation.

From the Mary Moers Wenig Student Writing Competition to the Dennis I. Belcher Young Leaders Program to the ACTEC Estate Planning Essentials videos, the Foundation supports our three key audiences with critical programs funded, in large part, by our Annual College Campaign.



TOTAL $348,133



THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

Statement of Financial Position
As of April 30, 2025

	2025
Assets	
Cash and cash equivalents	$ 417,634
Investments	2,407,071
Pledges receivable	10,075
Amount due from ACTEC	500
Prepaid expenses	4,567
Fixed assets, net	37,809
Total assets	$ 2,877,656
Liabilities and Net Assets Liabilities	
Accounts payable and accrued expenses	$ 2,248
Grants payable	88,443
Amount due to ACTEC	4,431
Total liabilities	95,122
Net Assets	
Without donor restrictions	2,226,203
With donor restrictions	556,331
Total net assets	2,782,534
Total liabilities and net assets	$ 2,877,656

Statement of Activities
As of April 30, 2025

	2025
Activities without donor restrictions	
Support:	
Contributions	$ 156,401
In-kind contributions	228,097
Net assets released from restrictions	35,000
Total support	419,498
Expenses:	
Program service:	
Grants and honorariums	176,187
Supporting services:	
General and administrative	252,536
Fundraising	6,353
Total supporting services	258,889
Total expenses	435,076
Change in net assets without donor restrictions from operations	(15,578)
Investment return	150,009
Change in net assets without donor restrictions	134,431
Activities with donor restrictions:	
Contributions	25,000
Investment return	31,420
Net assets released from restrictions	(35,000)
Change in net assets with donor restrictions	21,420
Change in net assets	155,851
Net assets:	
Beginning	2,626,683
Ending	$ 2,782,534

Statement of Cash Flow
As of April 30, 2025

	2025
Cash flow from operating activities	
Net change in net assets	$ 155,851
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Net unrealized gain on investments	(26,706)
Amortization of software	1,277
Changes in operating assets and liabilities:	
Pledges receivable	(4,125)
Amount due from ACTEC	-
Accounts payable and accrued expenses	(5,179)
Amount due to ACTEC	(828)
Prepaid expenses	540
Grants payable	(45,537)
Net cash flows from operating activities	75,293
Cash flow from investing activities	
Proceeds from sales or maturities of investments	927,237
Purchases of investments	(781,369)
Purchases of fixed assets	(28,948)
Net cash flows from investing activities	116,920
Net change in cash and cash equivalents	192,213
Cash and cash equivalents, beginning of year	225,421
Cash and cash equivalents, end of year	$ 417,634
Schedule of noncash investing activities:	
Donated securities	$ 1,614

Generous Donors to the ACTEC Foundation

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

Donations Made in Honor of Someone From March 6, 2023, Through March 9, 2026

Carolyn C. Clark
M. Patricia Culler
Gary B. Freidman
Thomas F. Garth
Robert K. Kirkland
Deborah O. McKinnon
S. Alan Medlin
Justin Miller
M. Elizabeth Monihan
Karen M. Moore
Mary F. Radford
H. Randolph Williams
Howard M. Zaritsky

Donations Made in Memory of Someone From March 6, 2023, through March 9, 2026

Harold Apolinsky
John E. Bakke III
Phillip A. Baumann
Dennis I. Belcher
Alexander A. Bove
Bowlman T. Bowles Jr.
Lucious H. Bracey Jr.
Steve Brand
Douglas M. Cain
Victoria Challis
Betty M. Coale
Heywood H. Davis
J. Chrys Dougherty
Dan Ebner
Daniel Ebner
Mark A. Fankhauser
Deborah Catherine Faust
Michael L. Fay
Dena C. Feeney
Gary B. Freidman
J. Govan Gardner
Mervyn S. Gerson
Charles F. Gibbs
Hugh W. Gill IV
L. Henry Gissel Jr.
Molly Gorman
Richard H. Greenberg
Graham D. Holding
Rodney N. Houghton
John Charles Huston
John Arthur Jones
Hugh F. Kendall III
Margaret Elizabeth Kirkland
Margaret Jean Kirkland
Jeffrey B. Kolb
Robert Y. Kopf Jr.
Daniel E. Lewis Jr.
Henry A. Lowet
Marylin J. Maag
Donald O. Manning
Donat C. Marchand
Daniel H. Markstein III
Mary Jane McConnell
Larry McLeod
Franchelle Cole Millender
Malcolm A. Moore
Darrel A. Morf
Darrel Morf
James A. Nepple
Rudy Ogburn
William D. Pargaman
Benjamin G. Paster
J. Edgerton Pierson Jr.
Robert C. Pomeroy
Gary A. Powell
John R. Price
Gina Silvestri
David J. Stoll
Robert D. Taisey
Robert Taisey
Nirakar C. Thakur
Susan K. Tomita
John D. Valentine
Howard G. Wachenfeld
John A. Wallace
Keith H. West
Wilda Willms
Shawn P. Wolf
Richard L. Zinn

Generous Donors to the ACTEC Foundation

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

All Donations From March 2, 2023, Through March 9, 2026

Susan L. Abbott
Mary M. Ackerly
Maureen C. Ackerly
Jolyon Acosta
Frank T. Adams
Stephanie Addeo
Charles F. Adler
Kyle Agee
Farhad Aghdami
Stephen R. Akers
David J. Akins
Mary Akkerman
Amy Albert
Tyler Allain
Leslie Kiefer Amann
Barbara McComas Anderson
Andrew Allen Charitable Foundation
Patricia M. Annino
R. Gordon Appleman
Katherine Marie Arango
Elizabeth K. Arias
Theodore B. Atlass
Ronald D. Aucutt
Stéphanie Auféril
Robert E. August
David A. Baker
Merry Balson
Kristin Brown Banda
Kenneth P. Barczak
Shannon K. Barks
Susan T. Bart
Donna G. Barwick
Leigh-Alexandra Basha
W. Carter Bates, II
Elizabeth A. Bawden
Laura Weintraub Beck
Roger Q. Beck
John R. Becker
Edward Jay Beckwith
Marvin Bradford Bedingfield
Roger L. Beebe
Bruce O. Bekkedahl
Amy B. Beller
Norman J. Benford
Roy A. Berg
Turney P. Berry
James B. Bertles
Gerry W. Beyer
Nell King Bieger
Peter Bietz
MaryEllen Bishop
Gary W. Bjelland
Watson B. Blair
Jonathan G. Blattmachr
Marvin E. Blum
Bruce H. Bokor
Bonhams
James L. Boring
Robert D. Borteck
Bove & Langa P.C.
Bowlman T. Bowles, Jr.
Karen Elizabeth Boxx
Donna Braman
William Bert Brannon
Gerard G. Brew
Kenneth P. Brier
James R. Bright
H. Chalk Broughton, Jr.
Bill Brown
Joseph Lee Brown
Kristin Brown
Lora L. Brown
Robert M. Brucken
Elaine M. Bucher
Ann B. Burns
Richard R. Burns
Winston Busby
Sarah S. Butters
Reynolds T. Cafferata
Randal B. Caldwell
Gene M. Carlino
Timothy G. Carroll
Elizabeth Carter
Jean Gordon Carter
Alan L. Cates
Rita Bragg Caughman
Central New York Community Foundation
Chang H. Chae
John M. Challis
T. Jack Challis
Darcy J. Chamberlin
Sandra J. Chan
BethAnn Boudah Chapman
Mark M. Christopher
Gary Clark
Harwell E. Coale
Hannah Margaret Coffin
Charles A. Collier
Andrew R. Comiter
Richard B. Comiter
Community Foundation of Louisville
Tami Conetta
Barry S. Corbin
Philip C. Corbo
Allison Cornwell
Christina Costa
Bronwen L. Cound
Anne W. Coventry
Richard B. Covey
Tracy Craig
Bridget J. Crawford
Robert Creighton
Nancy Crow
M. Patricia Culler
Sara G. Curley
Mark W. Curnutte
Matthew D'Emilio
Robert T. Danforth
Tatiana F. DaSilva
Davies Law Firm PLLC
Lora G. Davis
Mickey R. Davis
Samantha Weyrauch Davis
Christina Dawson
John Dedon
J. Michael Deege
Laura DelFratte
Lauren DeMatteo
Faith DeNoble
Lauren Y. Detzel
Tracy Blake DeVlieger
Donald DiCarlo
David J. Dietrich
Giampiero (G.P.) Diminich
Nathaniel Michael DiResta
Nikola R. Djuric
Dorothy L. Donaldson
Samuel A. Donaldson
P. Daniel Donohue
Stuart B. Dorsett
James Dougherty
W. Birch Douglass, II
Anthony Dragga
Michael A. Dribin
Patrick Duffey
S. Gray Edmondson
David F. Edwards
Guy Storms Emerich
David M. English
Richard L. English
David J. Estes
Tommy C. Estes
Evelyne V. Johnson–Thomas Gardner Paynter Foundation
Constance Eyster
Elizabeth Falkoff
Matthew Fecteau
Brian J. Felcoski
Donna Esposito Fincher
Randy E. Fisher
John Fitzpatrick
Dana G. Fitzsimons, Jr.
FLATEC, LLC
Fleming & Curti, PLC
Gary Fletcher
Larry A. Flournoy, Jr.
Flournoy McLain, P.C.
Todd A. Flubacher
FOCUS Family Office Counsel
Debra L. Foster
Jill R. Fowler

Generous Donors to the ACTEC Foundation

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

All Donations From March 2, 2023, Through March 9, 2026

Charles D. Fox, IV
Richard L. Fox
Franklin Karibjanian & Law PLLC
Terrence M. Franklin
Barbara Freedman Wand
Alan D. Freer
Gary B. Freidman
Danielle Friedman
Patricia Friedman
Theron E. Fry
Marcia K. Fujimoto
Gregory L. Fullerton
John F. Furniss, II
Leigh Furtado
Gregory V. Gadarian
Thomas P. Gallanis
Keith Bradoc Gallant
Katherine E. Galloway
Richard R. Gans
Adam Garber
Lizzy Garlovsky
Keisha A. Garner
Lauren Garner
Susan N. Gary
Gaslowitz Frankel LLC
Magdalen Gaynor
Karen S. Gerstner
Rebecca W. Geyer
Robert W. Goff, Jr.
Alvin J. Golden
Robert W. Goldman
Tudor Goldsmith
David B. Gollin
James C. Gooch
Deborah Packer Goodall
Michael M. Gordon
Peter S. Gordon
Steven B. Gorin
Joseph G. Gorman, Jr.
William H. Gosline
Carolyn P. Gould
Vaishali Goyal
William R. Graf
Michael L. Graham
Michelle B. Graham
Sarah Grandfield
Angelo Grasso
Lynne K. Green
Tina R. Green
Edward W. Griggs
Bradley C. Grossenburg
T. Randall Grove
Amanda M. Gyeszly
Robert Haggard
Ellen Hain
C. Wells Hall, II
Martin Hall
Robert L. Hallenberg
Thomas G. Hamill
David L. Hanson
Mark K. Harder
James C. Hardin, II
Robert Matthew Harper
John M. Harpootian
Carol A. Harrington
Carrie Harrington
Heather Harris
Susan R. Harris
T. Randolph Harris
Ellen K. Harrison
Louis S. Harrison
John A. Hartog
Robert W. Hastings, II
Jason E. Havens
Philip J. Hayes
Heart of America Fellows Institute
Samantha Heaton
Kathryn Baldwin Hecker
Martin A. Heckscher
Frank C. Heinisch
Paul C. Heintz
Kelly L. Hellmuth
Kelly S. Henry
Miriam W. Henry
David R. Hermenze
Amy Morris Hess
Bernard J. Hickert
John F. Higgins
Christina Goshaw Hinkle
Linda B. Hirschson
Joseph G. Hodges, Jr.
Hoffman Sabban Watenmaker
Dan W. Holbrook
Case Hoogendoorn
Andrew H. Hook
Craig Hopper
Abbey M. Horwitz
Susan T. House
John W. Howald
Nancy E. Howard
Richard H. Howard-Smith
Christopher R. Hoyt
Christopher B. Hunt
Lauren Hunt
Joshua E. Husbands
Elizabeth Holland Hutchins
Henry H. Hutchinson
J. Tod Hyche
Shaheen I. Imami
Jack Beaty Educational Scholarship Foundation
Lauren Jenkins
Gray Johnsey
Linda F. Johnson
Sarah Moore Johnson
W. Steven Johnson
Sarah S. Johnston
John M. Jolley
Christopher D. Jones
Christopher J. C. Jones
Michael Kaelin
Shaina Kamen
Kim Kamin
Amy K. Kanyuk
George D. Karibjanian
Glenn M. Karisch
Thomas M. Karr
Lawrence P. Katzenstein
Beth Shapiro Kaufman
Leigh A. Kaylor
Nicholas Wayne Keller
Emily Kembell
Helen Lewis Kemp
Barry B. Kempson
Catherine H. Kennedy
Merideth Ketterer
Elizabeth Kim-Wei
Amy H. Kincaid
Timothy Kyle King
William D. Kirchick
Robert K. Kirkland
Richard O. Kissel, II
Sharon L. Klein
Eva Kliegman
Stephanie Klinkenberg-Ramirez
Carol Cioe Klyman
Raymond Joseph Koenig, II
Stuart J. Kohn
Paula A. Kohut
Edward F. Koren
Donald D. Kozusko
Ross Krajewski
Roy A. Krall
Robert B. Labe
Cynthia G. Lamar-Hart
Cristin C. Lambros
James D. Lamm
Donald P. Lan
Robert L. Lancaster
William R. Lane, Jr.
Melissa Langa
Mark A. Langan
Jim Lanham
William P. LaPiana
Jill Lebowitz
Jonathan Lee
Judy Y. Lee
T. James Lee
Kristen M. Lewis
David Lieberman
William J. Lindsay, Jr.

Generous Donors to the ACTEC Foundation

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

All Donations From March 2, 2023, Through March 9, 2026

Lisa M. Line
Albert L. Lingelbach
Margaret G. Lodise
Jeff Loew
Bridget A. Logstrom Koci
Stephanie Loomis-Price
Robert D. LoPrete
Erica Lord
Russell P. Love
Christin P. Lovegrove
Carla Lovell
Richard C. Lowe
William H. Lunger
Maria M. Lynch
R. Hugh Magill
Robert W. Mairs
Brian Malec
Bruce E. Mantell
Richard A. Marone
Stewart Andrew Marshall, II
Steven F. Mattoon
Ruth Mattson
Kevin Matz
Gail E. Mautner
Lloyd G. McAlister
Virginia A. McArthur
David J. McCabe
Carlyn S. McCaffrey
James M. McCarten
Daniel McCarthy
C. Kevin McCrindle
Judith W. McCue
Letitia McDonald
John L. McDonnell
Letha McDowell
Stephanie McGehee-Shacklette
William J. McGraw, II
Deborah O. McKinnon
Lisa D. McLaughlin
Nancy McLaughlin
Robert A. McLeod
Julia McVey
John F. Meck
Julia B. Meister
Hannah W. Mensch
Kent A. Meyerhoff
Peter Mezey
Louis A. Mezzullo
Amy Michaud
John T. Midgett
Steven K. Mignogna
Kevin D. Millard
Jill L. Miller
Justin T. Miller
Wilhelmina Dingemans Miller
James C. Milton
Anne W. Mitchell
Joy Michiko Miyasaki
M. Elizabeth Monihan
Anna Katherine Moody
Janet Wilson Moore
Karen M. Moore
Lee Moore
Samantha Moore
Richard Michael Morgan
Ralph R. Morrison
Amy N. Morrissey
Peter Moshang
Peter T. Mott
G. Barton Mowry
Larry Moye
James P. Mulhern
Rebecca Murphy
William G. Murray
Kendis Key Muscheid
Jeffrey N. Myers
Meghan L. Myers
Charles Ian Nash
Barry A. Nelson
Randy S. Nelson
Michael A. Neufeld
New Jersey Fellows
Hilary A. Newcomb
Jeanne L. Newlon
Hung Nguyen
Kenleigh Nicoletta
Edward C. Northwood
Holly B. Norvell
Colleen O'Connell
Abigail O'Connor
Andrew O'Gwynn
Douglas B. O'Neal
Raymond C. Odom
Raymond K. Okada
Nathan Olansen
Duncan E. Osborne
J. Lee E. Osborne
Cynda C. Ottaway
Langdon T. Owen
Kaitlyn Pacelli
Stephen J. Pagano
Joann T. Palumbo
Benetta Y. Park
L. Howard Payne
Thomas E. Peckham
Thomas D. Peebles, Jr.
Jeffery T. Peetz
Eric W. Penzer
Kelly Perez
Sandra Lynn Perkins
Natalie M. Perry
Stephanie Perry
Marshall H. Peterson
David K. Petty
Carol Pfeiffer
Nikki Pielop
Jennifer R. Pierce
Charles W. Pieterse
Rachael K. Pirner
Jeffrey J. Pirruccello
Andrew Pleat
Tara Anne Pleat
Laura Walker Plunkett
William H. Pokorny, Jr.
Pokorny, Apuzzo & Buckley, PLLC
Susan Porter
Gary V. Post
Tracy M. Potts
Mark E. Powell
Arielle Prangner
David Pratt
Donald P. Prehoda, Jr.
Cassandra L.M. Prince
Queens University
Mary F. Radford
Michaelle D. Rafferty
Adam W. Randle
John C. Ransmeier
John Readey
Jack Reardon
Charles A. Redd
Carolyn Ann Reers
Cheyenne Reese
Nancy B. Reimann
Linda J. Retz
Reynolds T Cafferata Inc.
Lisa M. Rico
David T. Riedel
Jeremy Riley
Louisa Ritsick
James Vincent Roberts
Larry H. Rocamora
John T. Rogers, Jr.
Josh Rogers
Marjorie A. Rogers
Joseph Romano
Paul I. Rosenberg
Rosepink Law, PLLC
Bruce S. Ross
Alan F. Rothschild, Jr.
Andrew D. Rothstein
Nancy Schmidt Roush
Joshua S. Rubenstein
Daniel S. Rubin
Wendy S. Rusch
Anne Kelley Russell
Hollis F. Russell
Margaret E.W. Sager
Rosemarie Sam
Jared Sands
Mario Santilli, Jr.

Generous Donors to the ACTEC Foundation

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

All Donations From March 2, 2023, Through March 9, 2026

Kaitlyn Sapp
Anita M. Sarafa
Lynn B. Sassin
Christine Savage
Judith Saxe
Ronald J. Scalise
Darah Schofield
Schooley Law Firm
Latisha Bernard Schuenemann
Jason Scott
Margaret W. Scott
Jon Scuderi
Cameron R. Seybolt
Shaftel Delman, LLC
Matthew J. Shea
Virginia Symmes Sheehan
Kathleen R. Sherby
Patricia Shevy
Susan B. Shields
Suzanne L. Shier
Jennifer Shirkey
Sussan H. Shore
Roger L. Shumaker
Tanya Shunnara
Anita J. Siegel
Christopher P. Siegle
Douglas L. Siegler
David L. Sigler
Gregg M. Simon
Stacy E. Singer
Barbara A. Sloan
Terry Slye
George L. Smith
Kimberly Smith
Susan Kimsey Smith
Rebecca Smitherman
Cody Snyder
Susan D. Snyder
Stephen L. Sobey
Molly R. Soiffer
David C. Sojourner, Jr.
Greta E. Solomon
Kurt A. Sommer
Martha Leary Sotelo
Russell J. Speidel
Jennifer M. Spitz
Barry F. Spivey
Stacey Spivey
James D. Spratt, Jr.
Troy Stackpole
Daniel Stanek
Doug Stanley
Timothy Stanley
Lois Ann Stanton
Alfred J. Stashis
Lee M. Stautberg
Jeanine Steffy
Steinbacher, Goodall Yurchak
Karen Sandler Steinert
Laurel Stephenson
C. Jean Stewart
Bruce C. Stockburger
Karen Stockmal
Kimberly H. Stogner
Benton C. Strauss
Hillary S. Stringfellow
John Strohmeyer
Nina B. Stryker
Rees M. Sumerford
Megan Sunderland
Akane R. Suzuki
Scott A. Swain
Bridget O'Brien Swartz
Phyllis Taite
Janelle Tanenbaum
Tara Pleat
Luke Thomas Tashjian
Robert E. Temmerman, Jr.
Edward Terrell
John A. Terrill, II
The Community Foundation of Bartholomew County/Donald W. Jurgemeyer Fund
The Community Foundation of Chattahoochee County
The Diamond Law Firm
The Pi Foundation Inc.
The Witman Scholarship Foundation Inc.
Jeffrey C. Thede
Karen Hudson Thomas
Adrianne Thompson
E. Diane Thompson
Patricia M. Thompson
Angela Titus McEwan
Eileen Bannon Trost
Steven E. Trytten
John H. Turner, II
William A. Turner
Howard S. Tuthill, III
Stephanie M. Tuthill
Laura Upchurch
Michael L. Van Cise
Margaret Van Houten
Rebecca Ellen Vandall
Mary E. Vandenack
Elizabeth Vannote
Christopher Daniel Vaughan
Bradford Vezina
R. Eric Viehman
Timothy J. Wachter
Christine Wakeman
James R. Walker
Melissa P. Walker
Harvey B. Wallace, II
Rebecca Wallenfelsz
Meredith Walsh
Suzanne Brown Walsh
Daniel Walters
Barbara Freedman Wand
Christopher J. Ward
Eric Ward
Jeremy T. Ware
WealthCounsel
Elizabeth E.W. Weinewuth
Andrew H. Weinstein
Amiel Z. Weinstock
Robert A. Wells
Benjamin Westcott
Brad Westerfield
Robert M. Weylandt
Michael D. Whitty
Beverly J. Wik
Torrey Wilkins
James A. Williams
John Williams
R. Mark Williamson
Melissa J. Willms
Catherine Wilson
Christopher James Winton
Dan Wintz
Leonard J. Witman
Alexander Wolf
Gene Wolf
Jerome L. Wolf
Harry W. Wolff, Jr.
Lauren Wolven
Tom D. Womack
James F. Wood
Richard D. Woods
Zoey Wright
Glen A. Yale
Munford R. Yates, Jr.
Randall M.L. Yee
Kristin Yokomoto
Breanna Young
Dan C. Young
Diana S.C. Zeydel
William V.A. Zorn
Eugene P. Zuspann, II

Ways to Donate

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL
ACTEC
FOUNDATION

Support the mission of the ACTEC Foundation to promote scholarship and education in trust, estate, and tax law. Your tax-deductible donation sustains programs that serve trust and estate professionals, law students and the general public. Join ACTEC Fellows and other trust and estate professionals by donating today through one or more of the following methods:

Online

Making an online donation is simple, secure, and cost-efficient.

DONATE NOW

By Check

Mail to:
ACTEC Foundation
P.O. Box 825922
Philadelphia, PA
19182-5922

Stock Donations

It's easy to support the Foundation with a gift of stocks or securities.

LEARN MORE

Annual Dues

When remitting dues to the College, consider adding a contribution to the ACTEC Foundation.

Planned Giving

Contact James D. Spratt, Jr., Esq. at (404) 523-3018 or email if you would like more information.

Matching Gifts

Your employer may match your donation, doubling your contribution; contact your benefits administrator for details.

In Memoriam

Honor a colleague, friend, or loved one with a memorial gift to the ACTEC Foundation.

Charitable Donations From Your IRA

LEARN MORE

Follow ACTEC Foundation programs on social media.

901 15th Street, NW, Suite 525 Washington, DC 20005
202-684-8460 | actecfoundation.org