



President's Message

I hope this message finds all of you in good health and looking forward to a wonderful year. Despite the challenges of the last two years, I am happy to report to you that The ACTEC Foundation continues supporting

projects in the trust and estate field that make us all better practitioners, thanks to your generous donations. Our work would not be possible without your help.

At its October 2021 Virtual Meeting, The Foundation's Board of Directors had the opportunity to review several grants. Of concern to the Board was the participants in the **Dennis I. Belcher Young Leaders** program. Due to the pandemic, participants in recent years have not been able to fully enjoy the leadership opportunities this program provides. The Board agreed to allow participation in recent years an extended period of time to use the remaining funds in these grants to attend meetings such as the spring ABA RPTE meeting.

Also at the October meeting, the Board voted to support an additional year of the Diversity, Equity and Inclusivity Committee's excellent video series, Planning for a Diverse and Equitable Future. If you have not had a chance to view February's video, **The Fight for Justice, Reparations and Bruce's Beach**, I urge you to do so and see page 2 for details. It is a discussion with Kavon Ward, founder of Justice for Bruce's Beach, and attorney George Fatheree III about their efforts to return that property to the heirs of

the Bruce Family. Released to honor Black History Month, this video explores the historical injustice done to the Bruce family when their land was taken using Eminent Domain. The series posts a new video on the first Monday of every month – please be sure to tune in monthly for these thought-provoking videos.

Finally, The Board approved a second grant to support **The Commons Law Center**. This grant will help the Commons Law Center provide educational programs for the underserved population in Portland, Oregon regarding the potential services of estate planning attorneys. They will be recording videos with clients about the benefits of using estate planning tools in hopes of working with additional families. The Center will also conduct client workshops, such as a power of attorney workshop. This grant is structured as a challenge grant, requiring the Commons Law Center to raise a portion of the funds for the program from the Portland Housing Bureau and an additional amount from other donors prior to the release of The Foundation's grant. The Foundation is pleased to be supporting this organization in its goal to provide estate planning services to the underserved population in Portland.

I urge you to join me in **supporting** The ACTEC Foundation.

Yours sincerely,

Jeffrey C. Thede

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2021-2022 All College Campaign

The ACTEC Foundation is pleased to announce a record-breaking month of fundraising in November 2021 as part of our All-College Campaign! Your support of the All-College Campaign raised \$48,176, our best month in more than ten years. These donations will enable The ACTEC Foundation to continue to support the programs that benefit the trust and estate profession, students and young leaders in the trust and estate field, the general public, and ACTEC Fellows.



California Governor Gavin Newsom signed Senate Bill No. 796, which cleared the path for the Bruce's heirs to have the property returned to them.

In honor of Black History Month, the Planning for a Diverse and Equitable Future video series shared the story of Bruce's Beach and interviewed the attorney and land-rights activist instrumental in bringing awareness and reparations for the property. It is a powerful video representative of the equality issues that the DE&I Committee is discussing. The ACTEC Foundation funded season I and II of the series. Please take 15-minutes to watch the video and inform yourself of the issue: **The Fight for Justice, Reparations and Bruce's Beach.**

Planning for a Diverse and Equitable Future Discusses National Topic

In 1912, Black entrepreneurs Charles and Willa Bruce purchased a beachfront property in Manhattan Beach, California. "Bruce's Beach," which included a dance hall and café, was a favorite destination resort for Black families. In 1927, eminent domain was used by the city of Manhattan Beach to seize the property with the plan to create a park. With increased national awareness and the Black Lives Matter movement, a renewed demand for justice propelled the issue into the state and national discussion. On September 30, 2021,

Help Spread the Word!

MARY MOERS WENIG STUDENT WRITING COMPETITION

Deadline June 30, 2022.

First Prize — A Full Tuition Scholarship to the Heckerling Graduate Program in Estate Planning at the University of Miami School of Law for the 2023-2024 or 2024-2025 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*.



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actecfoundation.org/law-student-writing-competition

The ACTEC Foundation



Spring Derby

3rd Annual ACTEC Foundation Derby

It's time to don those fancy hats and fascinators and mix up a batch of mint juleps! The ACTEC Foundation 3rd Annual Derby is set to open on **April 4!** Last year's Derby, which honored beloved Foundation Past President L. Henry Gissel, Jr. was a nail-biter until the very last day, with jockeys Lora Davis from Texas and Charlie Nash from Florida battling it out to the finish line. You'll want to get your bets in early to support your favorite jockey this year to ensure they have a good chance as we open the gates and let the jockeys and their steeds run!

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Check – Make the check payable to "ACTEC Foundation" and mail to The ACTEC Foundation, 901 15th Street, NW, Suite 525, Washington, DC 20005. Be sure to include where any acknowledgement should be sent.

Amazon Smile – Select The ACTEC Foundation as your beneficiary when you are shopping on smile.amazon.com. For eligible purchases at AmazonSmile, the AmazonSmile Foundation will donate 0.5 percent of the purchase price to The ACTEC Foundation.

Annual Membership Dues – When remitting ACTEC dues, consider adding an annual contribution to The ACTEC Foundation.

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