



## President's Message

It is with both sadness and pride that I pen my last message as President of The ACTEC Foundation. The last three years have been a wonderful challenge of raising awareness about the work of The ACTEC Foundation, raising money to support that work, and awarding grants to worthy recipients in the Trust and Estate field. Working with the Foundation's very talented Board and extraordinary staff has been a joy.

Over the last three years, the Foundation has funded grants including:

1. The Dennis I. Belcher Young Leaders Program, now in its fifth year;
2. Updates to the ACTEC Commentaries to the Model Rules of Professional Conduct, scheduled for publication in 2021;
3. The establishment of a Wills for the Underserved Program at the University of Oregon;
4. Continued support of the Student Editorial Board at Hofstra University;
5. The ACTEC Trust and Estate Talk podcasts and ACTEC Family Estate Planning Guide videos;
6. Support for an empirical study regarding the nature of testamentary disposition of assets by persons in nontraditional families (see page 2);
7. The 2020 Lloyd Leva Plaine Speaker at Heckerling (see page 3); and,
8. So much more to promote scholarship and education in trust, estate, tax, and related areas of the law by supporting scholarship to improve the law and by encouraging teaching, careers and life-long learning in the area.

I'd like to repeat my thanks to Robert E. (Bob) Temmerman, Jr., whose nearly 1,000 mile Bike Ride Fundraiser from Chicago to Philadelphia raised nearly \$25,000 for the Foundation and raised its awareness in the College. His next adventure is a nearly 550 mile ride to the Asheville, North Carolina meeting in June, 2020. **Bob, John Hartog** and **Margaret Hand** would love to have you along for the ride – contact any of them for information. You can support this adventure by donating to individual riders' campaign – look for that information soon.

In Philadelphia we launched our successful Blue Ribbon campaign to recognize donors to The ACTEC Foundation. We will again recognize donors at the annual meeting in Boca Raton, Florida, and I hope to see all attendees wearing bright ribbons signifying their support of The ACTEC Foundation. If you have not yet made your donation, you may do so quickly and easily at [actecfoundation.org/DonateNow](http://actecfoundation.org/DonateNow), and receive your ribbon right away.

I know I am leaving The ACTEC Foundation in good hands with Jeff Thede as President, but I plan to remain an active donor to the Foundation and to serve as Immediate Past President for the next year.

Thanks to all of you who have provided support of The ACTEC Foundation over my three years as President.

Sincerely,

L. Henry Gissel, Jr.

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# Biking for The ACTEC Foundation

## RECAP OF 2019 FALL MEETING RIDE



Robert E Temmerman, Jr. (Bob) and Laura Hill Temmerman were greeted by ACTEC President John A. Terrill, II upon their arrival in Philadelphia at the end of a long bike ride

on a rainy day. Bob rode over 1,000 miles from Chicago to Philadelphia with a goal to raise awareness and \$25,000 for The ACTEC Foundation. One hundred percent of The ACTEC Foundation Board were included in the 139 Fellows who donated to the campaign, for a total of \$23,250!

Over the years, Bob has ridden nearly 3,000 miles to raise awareness and donations for The ACTEC Foundation. His journeys have included 400 miles from Las Vegas to Scottsdale, 400 miles from San Diego to Tucson, 400 miles from Scottsdale to Las Vegas, 450 miles along the Natchez Trace to Nashville, along with 1,000 miles from Chicago to Philadelphia most recently. L. Henry Gissel, Jr., President of The ACTEC Foundation, expressed his gratitude, “Thank you, Bob, for your incredibly generous effort for The ACTEC Foundation.”

## 2020 BIKE FUNDRAISING RIDE FROM STAUNTON, VA TO ASHEVILLE, NC

Plans are in progress for a nearly 550 mile bike ride for the 2020 Summer Meeting. ACTEC Fellows, spouses, and guests are welcome to participate in this scenic 12-day ride through the blue hills of North Carolina. The increase in availability of electric bicycles will make this ride doable for any level of rider. So, if you think you don't have the strength, stamina or courage to take on this challenge, talk to Bob, John or Maggie about the impact electric bikes are having on the bicycle touring industry. They would be happy to discuss that option with you if you are at all curious and interested in cycling the spectacular Blue Ridge Parkway. They will steer you in the right direction to make this adventure happen. Each rider will have an individual donation page with an expectation to raise funds in support of The ACTEC Foundation. For more information on how to participate in the ride, please contact John Hartog at [jahartog127@gmail.com](mailto:jahartog127@gmail.com); Margaret Hand at [mmhand@hbh.law](mailto:mmhand@hbh.law); or Robert Temmerman at [bobtemm@gmail.com](mailto:bobtemm@gmail.com).



## Spotlight on Grant Recipient, Danaya Wright

In 2017 The ACTEC Foundation Board of Directors awarded a \$15,000 grant to Danaya Wright, Clarence J. Teselle Endowed Professor of Law, University of Florida, Levin College of Law for an empirical study regarding the nature of testamentary disposition of assets by persons in nontraditional families.

Wright's interest in the operation of succession law in nontraditional families stemmed from her 2016 article — published in the *Cornell Journal of Law and Public Policy* — that focused on inheritance penalties facing children in nontraditional families. That study led Wright to undertake an empirical analysis of the actual testamentary dispositions of nearly five hundred decedents, from which she was able to determine that roughly ten percent were in blended families of some sort. She concluded that the laws of intestacy in most states do not adequately address the probable intentions of decedents in non-nuclear families. Specifics of those findings appeared in the *ACTEC Law Journal* in winter 2017.

Though Wright's preliminary analysis found significant differences between how traditional and non-traditional decedents leave their property, and that the law of intestacy likely works against the intentions of non-traditional decedents, limitations in the size of her initial

study resulted in a small percentage of estates from which to draw meaningful conclusions.

The ACTEC Foundation grant allowed Wright to undertake a much broader study, by examining the estates of upwards of three thousand decedents and to also conduct a more granular study of how intestacy law may lead to greater wealth dissipation for vulnerable decedents with regard to their single largest asset: their family home. Wright presented details of this research at the UC Davis Symposium in October 2019, sponsored by The ACTEC Foundation, and in an article to be published in the *UC Davis Law Review* in spring 2020. She also presented results of the study in January, at the 2020 AALS conference in Washington, DC.

The ACTEC Foundation's support of professional development and education in trust and estate law through its grants continues to assist lawyers in their practice, law students and scholars with an interest in the trust and estate field so they may provide better service to the public. Further information about The ACTEC Foundation grants can be found at [actecfoundation.org/trust-and-estate-professional-resources/actec-foundation-grants](http://actecfoundation.org/trust-and-estate-professional-resources/actec-foundation-grants). Visit [actecfoundation.org/news/grant-recipient-Danaya-wright](http://actecfoundation.org/news/grant-recipient-Danaya-wright) to read the full article.

## Lloyd Leva Plaine Distinguished Lecture by Michael Greenwald



Michael Greenwald, formerly with the U.S. Treasury Department, delivered the Lloyd Leva Plaine Distinguished Lecture on January 14, 2020, during the 54th Annual Heckerling Institute on Estate Planning conference. The ACTEC Foundation sponsored the lecture, the sixth in the series. Mr.

Greenwald's speech, *The Future of Financial Warfare in an Era of Great Power Competition*, focused on the new tools and tactics facing American financial systems and discussed how the U.S. must address these geoeconomic threats to economic and national security.

Lloyd Leva Plaine was an accomplished Washington, D.C. estate planning attorney who, sadly, died too young, at the age of only 62 years, 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 are intended to recognize and celebrate Lloyd's commitment to her profession and to perpetuate the spirit, interests, standards and contributions reflected in her career.

## 2019 ACTEC Foundation Donors

*Thank you to all of the Fellows who have supported The ACTEC Foundation from October 1, 2019 through December 31, 2019!*

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THE AMERICAN COLLEGE OF  
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## ACTEC

FOUNDATION

**Law Student Writing  
Competition is Open.  
Deadline June 30, 2020.**

**First Prize** — \$5,000, publication in the *ACTEC Law Journal*, and eligibility for a full-tuition scholarship to the Heckerling Graduate Program in Estate Planning at the University of Miami School of Law.

**Second Prize** — \$3,000, online publication on The ACTEC Foundation website, and possible publication in the *ACTEC Law Journal*.

**Third Prize** — \$1,000, online publication on the ACTEC Foundation website, and possible publication in the *ACTEC Law Journal*.

For details visit [actecfoundation.org/  
law-student-writing-competition](http://actecfoundation.org/law-student-writing-competition)

## BLUE RIBBON DONOR RECOGNITION

The ACTEC Foundation introduced a "Blue Ribbon Campaign" at the Philadelphia, Pennsylvania meeting in October 2019 and it was a big success! Fellows who donated to The ACTEC Foundation recently sported a jaunty Blue Ribbon proclaiming them a "Foundation Donor." The ribbons raised awareness of the work that The ACTEC Foundation does to support scholarship in trusts and estates, and additionally raised more than \$3,000 on-site in Philadelphia.

Look for Fellows wearing Blue Ribbons in Boca Raton, Florida to identify those who support The ACTEC Foundation's good work. And, if you don't have a Blue ribbon on your name badge, just stop by The ACTEC Foundation booth during a coffee break to make a donation (or a pledge) and receive your Blue Ribbon.

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The ACTEC Foundation is committed to promoting scholarship and education in trust, estate and tax law. Your contribution is tax-deductible.

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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](http://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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**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@bowdenspratt.com](mailto:jimspratt@bowdenspratt.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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