



## President's Message

Happy New Year! I hope this New Year finds you as hopeful as I am, now that 2020 is behind us.

Despite the challenges we faced in 2020, I am happy to share that with your financial support The ACTEC Foundation has funded several important projects. At our Virtual Fall 2020 Board of Directors meeting, the Board funded an additional two years of support for the valuable and popular Trust and Estate Talk podcasts and the Family Estate Planning Guide videos. Both of these ongoing projects provide valuable content for trust and estate practitioners, their clients, and families starting on their estate planning journey. The Trust and Estate Talk podcasts have over 160,000 downloads and even more visits to the website. The Family Estate Planning videos have been viewed almost 14,000 times for a total of more than 1,000 hours! The repository of videos is now well-organized by topic on The Foundation's **Family Estate Planning Guide**. Both the videos and podcasts are also available to embed on your website and share with your network. Visit [actec.org/share](https://actec.org/share) for more information.

The Board ratified the emergency grant that the Executive Committee approved in June 2020 for The Commons Law Center, a Certified Pro Bono Agency with the Oregon State Bar. You may recall that this grant funds a 2020 law school graduate from the community for part-time work over eight months at The Commons Law Center. The law school graduate will help expand the provision of Estate Planning Services to the African American community and other underserved individuals in North/Northeast Portland, Oregon by conducting outreach

in African American communities, expanding on educational efforts already underway, and providing direct estate planning services for clients.

The ACTEC Foundation Board of Directors also voted to fund The Diversity, Equity & Inclusivity Committee's *Planning for a Diverse and Equitable Future* video series. The monthly videos discuss systemic issues in America and offer insight into solutions. The audience for these videos includes trust and estate practitioners, their clients, and the general public. The goal is to educate all audiences about issues relating to systemic racism and discrimination. The series is off to a great start! As of the end of January the first video, **Economic Equality in America**, has been viewed over 200 times. The second video, **Transgender? How to Change Your Legal Name and Gender Marker on Vital Records**, has been viewed over 400 times. **Wills, Slavery and Probate: The Legacy of Lucy Sutton** is the most recent video, released February 8 in honor Black History Month, and features ACTEC Fellow Terrence Franklin's research into his ancestor's journey from slavery to freedom.

With your generous financial support, The ACTEC Foundation can continue to fund projects that offer opportunities to learn, engage, and help all of us – trust and estate practitioners, students, and families.

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

Yours sincerely,

Jeffrey C. Thede

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## VOICES OF THE ACTEC FOUNDATION

Supporting The ACTEC Foundation with a contribution is critical to advancing the mission of providing trust, estate and tax learning for professionals, families and law students. But what, exactly, does a donation support? Who benefits? To show the value of the donations received and the programs funded, The ACTEC Foundation, released a series of videos to highlight the achievements - The Voices of The ACTEC Foundation.

This enlightening series of short videos showcases those whose lives have been positively impacted by ACTEC Foundation grants, made possible because of the generous contributions of our donors. ACTEC Fellows, professors, and students explain to donors the effect their financial support has had on Foundation programs and initiatives.

The videos highlight specific programs and services The ACTEC Foundation has supported with grants, including:

- **Dennis I. Belcher Young Leaders Program**
- **Mary Moers Wenig Student Writing Competition**
- **Wills for the Underserved Program**
- **ACTEC Family Estate Planning Guide**
- **The Commons Law Center Program**
- **ACTEC Trust and Estate Talk**

From encouraging students to research and write about trust and estates topics, to supporting rising young T&E lawyers, to helping a law school advance efforts to deliver estate planning services to underserved communities - the donations we receive make a significant impact!

Please take a moment to watch one or more of these videos. Hear the stories. Watch the faces of those impacted. And please, share these videos with others who may not know of The Foundation's good work. Use the videos to start a conversation with other ACTEC Fellows, with friends, colleagues and clients. Help The ACTEC Foundation continue to provide financial support for critical programs in the trusts and estates field by watching and sharing these videos.

The ACTEC Foundation



## Spring Derby

### L. Henry Gissel, Jr. Race of the Yearlings

The ACTEC Foundation's Yearlings, the most recent Foundation board members, have begun training for the 2nd Annual Spring Derby. The race will begin April 1 and the winner crowned on May Day. The yearling jockeys include Lora Davis, Cameron McCulloch, Charlie Nash, Benetta Park, Bruce Ross and Alan Rothschild.

Last year's riders are offering their advice and horse recommendations to the new board members. As the field prepares for the race, be sure you have added the race time to your calendar. The shout of "and they're off" will be here before we know it.

Stay tuned for more information as Spring nears.

#### IN MEMORIAM CONTRIBUTIONS 2020

*Contributions from January 1 through  
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# ACTEC

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### Law Student Writing Competition is Open.

**Deadline June 30, 2021.**

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

**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](https://actecfoundation.org/law-student-writing-competition)**



## Planning for a Diverse and Equitable Future

**Planning for a Diverse and Equitable Future**, a new video series produced by the Diversity, Equity and Inclusivity Committee, is made possible through support of The ACTEC Foundation. The series began in December 2020 and shares a new video the second Monday of each month.

**Economic Equality in America** featured Rochelle Riley, a guest speaker from ACTEC's Fall Meeting. ACTEC Fellow Stephanie Perry and Ms. Riley discuss how wealth disparity relates to the estates and trusts practice and how to effectuate change to diminish the racial wealth gap. The video includes practical recommendations for diversifying your client base and network.

**Transgender? How to Change Your Legal Name and Gender Marker on Vital Records** offers critical information for practitioners regarding LGBTQ and transgender individuals. ACTEC Fellows Cynthia G. Lamar-Hart and Paula A. Kohut share their professional experience and offer best practice advice for interacting with this client base.

**Wills, Slavery and Probate: The Legacy of Lucy Sutton** was released in February in honor of Black History Month. This docu-style video features ACTEC Fellow **Terrence M. Franklin's** discovery of a will executed 170 years ago, with distinct bearing on his ancestors' survival and his existence.

Please take the time to view all of these important videos.

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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](https://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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