



## President's Message

I am pleased to introduce to you the 7th Class of Dennis I. Belcher Young Leaders. This year's class includes four outstanding individuals: Brian Balduzzi of Philadelphia, PA; Caitlin Horne of Charlotte, NC; René Morency of Clayton, MO; and Melisa Seyhun of Chicago, IL. The Young Leaders program builds on ABA RPTE's two-year Young Fellows Program to provide an additional two years of financial support for a diverse group of trust and estate attorneys. The program is funded by The ACTEC Foundation through a grant request from ACTEC's Diversity, Equity and Inclusivity Committee. The financial support allows these attorneys to continue building the skills that will allow them to become future leaders in the trust and estate profession. To date, seven Dennis I. Belcher Young Leaders have been nominated and elected to ACTEC:

- **Marissa Dungey** of Greenwich, CT
- **Elizabeth Glasgow** of Los Angeles, CA
- **Chasity Grice** of Memphis, TN
- **Toni Ann Kruse** of New York, NY
- **JP Lee** of Columbia, SC
- **Raj Malviya** of Grand Rapids, MI
- **John Strohmeyer** of Houston, TX

The ACTEC Foundation is thrilled with the success of this program and hopes to see more Young Leaders nominated and elected to ACTEC!

I hope you will take time to read about the success of impactful Foundation-funded initiatives in this newsletter. The **ACTEC Trust and Estate Talks** podcasts, The ACTEC Diversity, Equity and Inclusivity Committee's video series **Planning for a Diverse and Equitable Future**, and **ACTEC's Family Estate Planning Guide** are drawing more and more focus to ACTEC and to the Foundation. Please see the "Success of ACTEC Funding Series" article on the next page of this Newsletter to understand how these exciting initiatives are garnering more interest and attention.

Please be sure to review the list of Donors from May 1 to September 23, 2021. Is your name included? If not, please check your mailbox in late October for The Foundation Annual All College Campaign. Join me in supporting this campaign so that your name will also appear in the March 2022 newsletter list of donors. Another way to support the Foundation is through making a memorial contribution. Remembering a colleague or loved one with a memorial donation is a wonderful way to honor the individual and the Foundation. Please see the list of In Memoriam donations included in this newsletter.

Your financial support makes all of our programs possible. Thank you in advance for joining me as a proud donor to The ACTEC Foundation.

Wishing you a healthy fall season,

Jeffrey C. Thede

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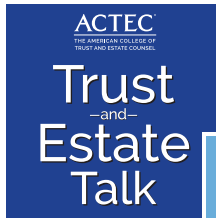
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## Success of ACTEC Foundation Funding Series

- ACTEC Family Estate Planning Guide (est. August 2016)
- ACTEC Trust and Estate Talk (est. February 2018)
- Planning for a Diverse and Equitable Future (est. December 2020)



The ACTEC Family Estate Planning Guide has attracted over 20% of the pageviews on the public website, second only to visitors using the Fellow directory. The Family Estate Planning Guide released its first two videos in August 2016. The series reformatted in 2019 to shorter videos and began releasing videos

monthly in March of that year. The [actec.org/estate-planning](https://actec.org/estate-planning) section of the College's website has received over 175,000 page views, and the videos have been viewed over 20,000 times, totaling over 1,400 hours watched.

The ACTEC Trust and Estate Talk podcasts have developed a loyal following. Since the first podcast launched in February 2018, The ACTEC Foundation website has received almost 250,000 pageviews. Additionally, the series has had over 210,000 podcast downloads through apps such as iTunes.

Planning for a Diverse and Equitable Future is a video series created by the Diversity, Equity and Inclusivity Committee. The first video in the monthly was released in December 2020. The [actec.org/diversity](https://actec.org/diversity) section of the website has received over 16,000 page views, and the videos have been viewed nearly 2,800 times totaling 225 hours watched.

## Tulane/ACTEC Symposium on Conflict of Laws in Trusts and Estates

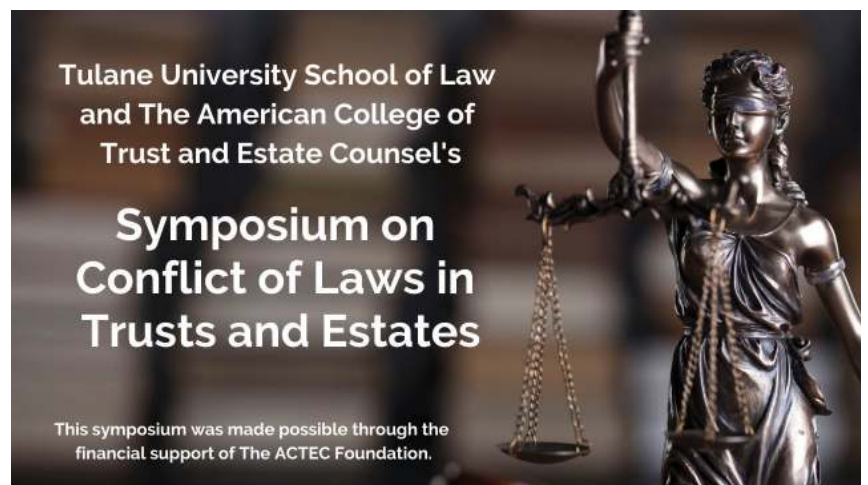
Tulane University School of Law and **The American College of Trust and Estate Counsel's Legal Education Committee** are organizing the 9th academic symposium financially supported by **The ACTEC Foundation**. The symposium, Conflict of Laws in Trusts and Estates will be held at the Tulane University School of Law on Friday, October 21, 2022. The keynote address will be given by Professor Jeffrey Schoenblum of Vanderbilt University Law School.

Among the objectives of this symposium are the following:

- To bring together prominent and up-and-coming scholars for the discussion of important issues in conflict of laws;
- To spur leading-edge research on conflict of laws in trusts and estates;
- To encourage professors of trusts and estates to incorporate and consider issues of conflict of laws in their scholarship and teaching;
- To promote collaborations and exchanges between conflict-of-laws scholars and scholars of trusts and estates.

Papers presented at the symposium will consist of papers selected from this Call for Papers and papers from invited speakers. The papers will be published in the *Tulane Law Review*.

If you would like to be considered to present a paper, please submit an abstract of your paper to Ron Scalise by email ([rscalise@tulane.edu](mailto:rscalise@tulane.edu)) by November 1, 2021. Those chosen



to participate in the symposium will be notified no later than December 1, 2021. Symposium speakers will be required to submit a draft of their papers by August 15, 2022, so that the panel commentators will have sufficient time to prepare their commentary.

Symposium speakers will be reimbursed for their travel expenses (economy airfare, the cost of ground transportation, and up to two nights' hotel stay). Speakers will be invited to dinner on the evenings of Thursday, October 20, 2022, and (for speakers staying Friday evening) Friday, October 21, 2022.

Breakfast and lunch will be provided to speakers and attendees on Friday, October 21, 2022, courtesy of The ACTEC Foundation.

Questions about the symposium or this call for papers should be directed to Ron Scalise at the email address above. This symposium was made possible through the financial support of The ACTEC Foundation.

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Thank you to all who have supported The ACTEC Foundation from May 1 through September 23, 2021!

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**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.

**Stock Donations** – The ACTEC Foundation can accept your gift of stocks or securities. Contact Membership and Foundation Director, 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) 523-3018 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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