



## President's Message

2021 is already off to a galloping start for The ACTEC Foundation! Thanks to our five intrepid jockeys and the ACTEC Fellows who spurred them on with their generous contributions, we raised over \$36,000 in the 2021 ACTEC Foundation

Derby: The L. Henry Gissel, Jr. Race of the Yearlings. Jockey Lora Davis followed last year's Texas Fellows victory with a second consecutive first-place win. Charlie Nash put on the pressure to achieve second place, followed by Benetta Park, Alan Rothschild and Bruce Ross. All of our jockeys deserve a round of applause - \$35,000 represents an entire year of financial support for the ACTEC Trust and Estate Talk podcasts and the Family Estate Planning videos. I have no doubt that our dear friend Henry Gissel would be particularly proud of his home state Jockey Lora Davis riding her filly, The Patriot Gissel, named in honor of Henry.

Looking forward to 2021, we anticipate reviewing several new grant proposals, including a proposal for the next Symposium and funding for a new class of Dennis I. Belcher Young Leaders. The Foundation's Disaster Preparedness Task Force is well underway with its project to offer resources in preparation for natural disasters. Two law students have been hired to compile the information using materials already gathered by ACTEC

Fellows and to supplement that with new research. We hope that this project will result in a handbook that will be available, free of charge, to all ACTEC Fellows and other professionals. This work could not be done without your financial support.

The ACTEC Foundation has been and continues to be built by ACTEC Fellows to support the educational and other charitable activities of the College. The impact from sponsoring research and the dissemination of knowledge concerning the improvement of a legal system in probate, trust, tax, and related areas of the law is impressive. This is your Foundation – please reach out to the **Board of Directors** with suggestions for new projects and ideas for sharing content with the public. It is not just your financial support we seek, but also your participation in our work.

Please join me in congratulating the jockeys at the 2021 ACTEC Virtual Summer Meeting. And if you'd like to help them take a victory lap, donations for **The Derby** are still being accepted through June 30.

Wishing you a healthy summer,

Jeffrey C. Thede

## ACTEC FOUNDATION BOARD

### President

Jeffrey C. Thede  
Portland, OR

### Vice President

John T. Rogers, Jr.  
Los Angeles, CA

### Treasurer

James M. Maddox  
Hobbs, NM

### Secretary

Kathleen R. Sherby  
St. Louis, MO

### Chair, Fundraising Committee

Christopher B. Hunt  
Minneapolis, MN

### Chair, Grant Committee

Melissa J. Willms  
Houston, TX

### Directors

Susan L. Abbott  
Boston, MA

Elaine M. Bucher  
Boca Raton, FL

Stephanie B. Casteel  
Reno, NV

Lora G. Davis  
Dallas, TX

P. Daniel Donohue  
Sioux Falls, SD

Erik Dryburgh  
San Francisco, CA

David F. Edwards  
New Orleans, LA

David M. English  
Columbia, MO

Theron E. Fry  
Wichita, KS

Thomas P. Gallanis  
Iowa City, IA

Susan N. Gary  
Eugene, OR

Peter S. Gordon  
Wilmington, DE

T. Randolph Harris  
New York, NY

Joseph G. Hodges, Jr.  
Denver, CO

Christopher R. Hoyt  
Kansas City, MO

W. Cameron  
McCulloch  
Houston, TX

Michele A.W.  
McKinnon  
Richmond, VA

Charles Ian Nash  
Melbourne, FL

Benetta Y. Park  
Chicago, IL

Bruce S. Ross  
Los Angeles, CA

Alan F. Rothschild, Jr.  
Columbus, GA

Robert E.  
Temmerman, Jr.  
San Jose, CA

# Update: ACTEC Foundation Disaster Preparedness Task Force

The Disaster Preparedness Task Force (“Task Force”) of The ACTEC Foundation is pleased to begin work on resources for communities impacted by disaster. The Task Force’s project will expand on the research of the College’s Charitable Planning Committee. The project’s goal is to provide a central educational resource for ACTEC Fellows and members of the broader legal community to assist in the aftermath of a tragedy. The idea of the disaster preparedness resource was presented at two Charitable Planning Committee meetings. The goal is to provide a resource webpage and materials on [actecfoundation.org](http://actecfoundation.org) that is accessible without charge to professionals and local governments.

At the March 2021 Board of Directors meeting, The ACTEC Foundation approved \$10,000 in funding to hire two law student interns to assist with the initial phase of creating an outline for the online resources. Once the outline is completed, it will be reviewed and expanded by Charitable Planning Committee members.

The two law students are Victoria Lee Cejka and Brittany D. Green, both of whom graduated from Loyola University Chicago School of Law in May 2021. Victoria and Brittany have begun work on the outline under the supervision of Task Force Chair Susan L. Abbott. The student interns will expand on the initial draft outline and add original research and interviews with ACTEC Fellows who have expertise in this subject. The initial research stage of this project will likely extend into the summer of 2021.

## IN MEMORIAM CONTRIBUTIONS 2021

*Contributions from January 1 through  
April 30, 2021*

L. Henry Gissel, Jr.  
Robert D.W. Landon, II  
Carey J. Messina  
George H. Nofer  
Frank P. Reiche  
Rice M. Tilly

## 2021 ACTEC Foundation Donors

*Thank you to all who have supported  
The ACTEC Foundation from January 1 through  
April 30, 2021!*

Susan L. Abbott	T. Jack Challis
Angela McClendon Adams	Charles Ian Nash
Craig Sayers Adams	Chris Hunt
Frank T. Adams	Jean C. Coker
Farhad Aghdami	Richard B. Comiter
Stephen R. Akers	Tami Conetta
Katherine C Akinc	Debbie Cox
David J. Akins	Nancy Crow
Leslie Kiefer Amann	George L. Cushing
Barbara McComas Anderson	Erwin Davenport
Anonymous	Lora G. Davis
Niris Todd	Mickey R. Davis
Angkatavanich	Jeffrey C. De Francisco
Ronald D. Aucutt	Lauren Y. Detzel
Shannon K. Barks	Sandra F. Diamond
Susan T. Bart	Donald DiCarlo
Robert Barton	Tasha K. Dickinson
Jeffrey A. Baskies	David J. Dietrich
Amy B. Beller	Nikola R. Djuric
Gerry W. Beyer	Erik Dryburgh
Tracy Blake DeVlieger	Marissa Dungey
Bruce H. Bokor	David F. Edwards
Donna Braman	Kristi N. Elsom
David C. Brennan	Guy Storms Emerich
Rhonda H. Brink	David M. English
Elaine M. Bucher	Mark A. Fankhauser
Ann B. Burns	Dana G. Fitzsimons, Jr.
Reynolds T. Cafferata	Timothy L. Flanagan
Stephanie B. Casteel	Todd A. Flubacher
Rita Bragg Caughman	Terrence M. Franklin
	Theron E. Fry
	Gregory L. Fullerton

*continued next page*

# MARY MOERS WENIG WRITING CONTEST

THE AMERICAN COLLEGE OF  
TRUST AND ESTATE COUNSEL

**ACTEC**  
FOUNDATION

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

**DONATE  
TO**

THE AMERICAN COLLEGE OF  
TRUST AND ESTATE COUNSEL  
**ACTEC**  
FOUNDATION

## 2021 ACTEC Foundation Donors continued

Gregory V. Gadarian	J. Tod Hyché	Christin P. Lovegrove	William D. Pargaman	Jim Spratt, Jr.
Thomas P. Gallanis	Lauren Jenkins	David A. Ludgin	L. Howard Payne	Robert M. St. John
Richard R. Gans	Benetta Y. Park	Brian Malec	Jeffery T. Peetz	Lois Ann Stanton
Susan N. Gary	Amy P. Jetel	Richard A. Marone	Susan Porter	Alfred J. Stashis
Karen S. Gerstner	Linda F. Johnson	Thomas N. Masland	Mary F. Radford	Laurel Stephenson
Lynn Gissel	Sarah Moore Johnson	Daniel McCarthy	Michaëlle D. Rafferty	Kimberly H. Stogner
Wendy S. Goffe	Kim Kamin	Howard M. McCue, II	John T. Rogers, Jr.	Ivan Taback
Robert W. Goldman	Amy K. Kanyuk	Judith W. McCue	Bruce S. Ross	Deborah J. Tedford
Peter S. Gordon	George D. Karibjanian	Robert Lee McElroy, IV	Alan F. Rothschild, Jr.	Jeffrey C. Thede
Steven B. Gorin	Thomas M. Karr	Deborah O. McKinnon	Gideon Rothschild	Laura Upchurch
Linda Suzzanne Griffin	Shane Kelley	Michele A.W. McKinnon	Nancy Schmidt Roush	Christine Wakeman
Philip J. Halley	The Kelley Law Group, PL	Julia B. Meister	Daniel S. Rubin	Melissa P. Walker
James C. Hardin, II	Robert K. Kirkland	Blake Melton	Joseph O. Rubinelli, Jr.	Suzanne Brown Walsh
T. Randolph Harris	Rodney C. Koenig	Louis A. Mezzullo	Layne Rushforth	Elizabeth E.W. Weinewuth
Jason E. Havens	Paula A. Kohut	Amy Michaud	Deborah L. Russell	Thomas O. Wells
Travis Hayes	Edward F. Koren	Steven K. Mignogna	Hollis F. Russell	Susan S. Westerman
Steven L. Hearn	Robert L. Lancaster	Justin T. Miller	Lynn B. Sassin	Michael D. Whitty
William Thomas Hennessey, II	William R. Lane, Jr.	Larry Miller	Suzy Shaw	Melissa J. Willms
Kelly S. Henry	Melissa Langa	Janet Rae Montgomery	Kathleen R. Sherby	Daniel J. Wintz
Miriam W. Henry	Terry James (“Jim”) Lee	Janet Wilson Moore	Jennifer Shirkey	Harry W. Wolff, Jr.
Amy Morris Hess	Ann B. Lesk	Barry A. Nelson	Anita J. Siegel	Lauren Wolven
Craig Hopper	Laird A. Lile	Hung Nguyen	Yoshimi Smith	Richard D. Woods
Cristina Hug	Albert L. Lingelbach	Edward C. Northwood	Kurt A. Sommer	Randall M.L. Yee
Joshua E. Husbands	Stephanie Loomis-Price	Louis Nostro	Brian C. Sparks	Diana S.C. Zeydel
	Robert D. LoPrete	Cynda C. Ottaway	Russell J. Speidel	

## How to Contribute

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

Please join your colleagues in supporting The ACTEC Foundation through one or more of the following methods:

**Online** – Making an online contribution is simple, secure, and cost-efficient. Visit [actecfoundation.org/donate](https://actecfoundation.org/donate)

**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.

**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.

## ACTEC FOUNDATION STAFF

**ACTEC Foundation**  
901 15th Street, NW  
Suite 525  
Washington, DC 20005

T: (202) 684-8460  
F: (202) 684-8459  
[actecfoundation.org](https://actecfoundation.org)

**President**  
Jeffrey C. Thede  
(503) 416-6150  
[jef.thede@thede-culpepper.com](mailto:jef.thede@thede-culpepper.com)

**Executive Director**  
Deborah McKinnon  
(202) 684-8460  
[domckinnon@actec.org](mailto:domckinnon@actec.org)

**Membership and Foundation Director**  
Amy Michaud  
(202) 684-8453  
[amy.michaud@actec.org](mailto:amy.michaud@actec.org)

**Controller**  
Deborah Oberst, CPA  
[Debbie.oberst@actec.org](mailto:Debbie.oberst@actec.org)  
(202) 684-8460

**Digital Marketing Director**  
Suzy Shaw  
(443) 540-9928  
[suzy.shaw@actec.org](mailto:suzy.shaw@actec.org)