President’s Message

Welcome to the Fall 2019 ACTEC Foundation newsletter. The rest of the Foundation’s Board of Directors and I thank you for your continued support throughout the year.

I want to publicly thank Foundation Board Member Bob Temmerman, whose heroic Bike Ride Fundraiser for The ACTEC Foundation from Chicago to Philadelphia has already raised almost $12,000 with 100 percent support from members of The ACTEC Foundation’s Board of Directors. Bob’s goal for this ride was not only to celebrate his incredible healing journey after his bike accident three years ago, but to raise funds for, and equally important, awareness of The ACTEC Foundation. By asking for support of at least a penny a mile, which works out to a $10 donation for his 1,000-mile ride, Bob encouraged nine Fellows to make their first donation to The ACTEC Foundation out of 81 Fellows who have supported the Bike Ride thus far. The article on page two of this newsletter will give you more information. If you haven’t already done so, you still have time to support Bob at actecfoundation.org/2019BikeRide!

Which leads me to my next topic: donor recognition. The Foundation’s Board of Directors, at their meeting in Vancouver, British Columbia in June 2019, made a decision to begin recognizing donors publicly. In this edition of the newsletter, as well as on the Foundation’s website, actecfoundation.org/donors, you will find a list of all those generous supporters who have contributed to The ACTEC Foundation from October 1, 2018 through September 30, 2019. Those donors will also be recognized with a special ribbon on their name badges at the Fall 2019 Meeting in Philadelphia. If you’d like a ribbon for your badge, make a donation to Bob’s bike ride or actecfoundation.org/DonateNow, then see Amy Michaud of the ACTEC staff for a ribbon.

In Vancouver, The ACTEC Foundation’s Board of Directors also approved several worthy grants:

- A grant to fund the fifth class of Dennis I. Belcher Young Leaders was approved. This program provides two years of additional support to graduates of RPTE’s Young Fellows program, allowing diverse young T & E attorneys to build leadership skills.
- Support of the Hofstra Student Editorial Board for an additional three years was approved. This program, in conjunction with ACTEC, supports the ACTEC Law Journal while encouraging student educational activities in T &E law at Hofstra University.
- A grant proposal to support the 6th Edition of the ACTEC Commentaries was approved, which will reimburse the expenses of Karen Boxx, who will serve as the reporter for this 6th Edition.

Your contributions to The ACTEC Foundation make these and many other important grants possible. Once again, on behalf of The ACTEC Foundation Board of Directors, thank you.

Sincerely,

L. Henry Gissel, Jr.
President, ACTEC Foundation
Bob’s Crazy Ride from Chicago to Philadelphia

Bob Temmerman is putting his pedal to the metal to challenge Fellows of the College to support The ACTEC Foundation. On Thursday, September 26, Bob started his 1,000 mile journey from Chicago to Philadelphia on a bicycle. His goal is to raise $25,000 for The ACTEC Foundation by asking every Fellow to contribute a penny a mile — $10.

Bob has been a member of The ACTEC Foundation’s Board since 2016 and supports its mission to “promote scholarship and education in trust, estate, tax and related areas of the law by supporting scholarships to improve the law and by encouraging teaching, careers and life-long learning in the area.” The ACTEC Foundation supports many projects that benefit the College and the profession such as:

• The ACTEC Trust and Estate Talk podcast series;
• Engagement Letters and ACTEC Commentaries on the Model Rules of Professional Conduct;
• The Wills, Trusts and Estates Law eJournal - CMBO within the Social Science Research Network;
• Family Estate Planning Guide videos;
• Mary Moers Wenig Student Writing Competition;
• and the Dennis I. Belcher Young Leaders Program.

Thank you, Bob and everyone, for your support of The ACTEC Foundation. Your tax-deductible financial donation to actecfoundation.org/2019BikeRide enables these programs to continue and will fund future worthy programs.

New Class of Dennis I. Belcher Young Leaders

The Dennis I. Belcher Young Leaders Program was developed by The ACTEC Foundation to foster scholarship and education in the trust and estate practice, promote diversity and inclusivity and encourage the development of potential ACTEC Fellows. Participants in the program are offered tuition-free attendance to the ACTEC-ALI/CLE webinars, financial support to attend ABA/RPTE Section Meetings, and invitations to attend regional and state ACTEC events. We are pleased to announce this year’s class of Dennis I. Belcher Young Leaders:

• Caryn Friedman of Ernst & Young LLP in Washington, District of Columbia
• Danielle Kincaid of The Elder Law Group in Springfield, Missouri
• Kelly Perez of USB Financial Services Inc. in Dallas, Texas
• Abigail Rosen of Winstead, PC in Houston, Texas
• Jordan Veurink of Ballard Spahr LLP in Sioux Falls, South Dakota

Please visit the actecfoundation.org website to read more details about this impressive class of Young Leaders.
2019 Mary Moers Wenig Student Writing Competition Winners

The ACTEC Foundation announced the 2019 winners of the Mary Moers Wenig Student Writing Competition last month. First Place, Second Place and Third Place winners and two Honorable Mentions were selected among twelve student entries received and reviewed by a panel of judges appointed by the Legal Education Committee of the College. The winners are:

- **First Place**: Robert Daily — University of Georgia School of Law, “The Lender Loophole & the Deductibility of Investment Expenses in Family Offices”
- **Second Place**: Scott J. Lee — Georgetown University Law Center, “The Kaestner Trust Case — Due Process and State Taxation of Non-Resident Trustees”
- **Third Place**: Ryan F. Bender — New York University School of Law, “A Philanthropist Cloaked by Fog — Scofield Thayer and Lessons on Testamentary Capacity”
- **Honorable Mention**: Alissa Mack — Arizona State University, Sandra Day O’Connor College of Law, “A Review of the Revised Uniform Limited Liability Company Act: The Good, the Bad and Your Operating Agreement”
- **Honorable Mention**: Gabriel Slamovits — New York University School of Law, “Cadaver Donations in the Jewish Legal System”

Please visit the actecfoundation.org website to read the full press release.

2019 ACTEC Foundation Donors

Thank you to all of the Fellows who have supported The ACTEC Foundation from October 1, 2018 through September 30, 2019!

For details visit actecfoundation.org/law-student-writing-competition
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

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 information on where to direct the contribution.

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.

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

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 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.