

ACTEC®

FOUNDATION

NEWS



President's Message

As the Foundation's Board of Directors looks forward to its fall meeting, all of us on the Board would like to thank the generous donors who have supported our work over the last year. In this season of change, as many of us watch the leaves turn from green to gold and red, we reflect on how the grants

The Foundation makes bring about positive change in the trust and estate profession and in the wider world. To all of our donors, a hearty thank you!

At the Board meeting this fall, The Foundation will be considering a new Spending Policy to be more effective and impactful in our grantmaking. We will be reviewing some interesting new grants. It's exciting to see how our refreshed website is bringing increased awareness of The Foundation's grantmaking to a wider circle of nonprofit organizations seeking to positively influence the practice of trust and estate law, and the real-world effect the trust and estate practice has on the people we serve.

Speaking of the website, if you have not yet had a chance to review the visual timeline and the history page of Foundation Past Presidents, I encourage you to do so! The Marketing and Communications Committee continues to improve and expand the website with fresh ideas, and they welcome your feedback. The visual timeline is a wonderful walk down the Foundation's memory lane, with graphics and photos to remind us of the

long and growing history of The Foundation. Seeing the list of Past Presidents gives us an opportunity to reflect on our storied leadership and to offer gratitude to those who have led us this far.

And I would be remiss if I didn't mention our FUN-draiser happening during the 2025 Fall Meeting! If you are joining me in Austin, look for members of the Fundraising Committee enthusiastically promoting the **Circuits of America** Participation FUN-draiser near ACTEC's Registration Desk! Inspired by the F1 U.S. Grand Prix at the Circuit of the Americas racetrack just south of Austin, Fellows can donate to support their Circuit Court (i.e., the U.S. Court of Appeals for their Circuit) racecar. The racecar with the highest percentage of donating Fellows in that Circuit wins the race! The goal of this is to get all Fellows engaged in a fun and competitive game that raises awareness of The ACTEC Foundation. Look for the Fall 2025 Foundation Donor ribbon on Fellows' badges so you can talk about who's in the lead each day. I anticipate this is going to be the hottest coffee break topic in Austin!

And on that enthusiastic note, I'll close with a reminder of how grateful I am personally for every donor and every donation.

With sincere thanks,

President, ACTEC Foundation

ACTEC FOUNDATION BOARD

President

John T. Rogers, Jr.
Glendale, CA

Vice President, and Co-Chair, Grant Committee

Lora G. Davis
Dallas, TX

Treasurer

T. Randolph Harris
New York, NY

Secretary, and Co-Chair, Grant Committee

Kendis Key Muscheid
Phoenix, AZ

Co-Chair, Foundation Fundraising Committee

Robert K. Kirkland
Liberty, MO

Directors

Farhad Aghdami
Richmond, VA

Brad Bedingfield
Boston, MA

Lora G. Davis
Dallas, TX

S. Gray Edmondson
Oxford, MS

Todd A. Flubacher
Wilmington, DE

Chasity Grice
Memphis, TN

Shannon G. Guthrie
Dallas, TX

T. Randolph Harris
New York, NY

Joshua E. Husbands
Portland, OR

Robert K. Kirkland
Liberty, MO

Cynthia G. Lamar-Hart
Birmingham, AL

William P. LaPiana
New York, NY

Judy Y. Lee
Honolulu, HI

R. Hugh Magill
Minneapolis, MN

W. Cameron
McCulloch
Houston, TX

Kendis Key Muscheid
Phoenix, AZ

Charles Ian Nash
Melbourne, FL

Jeanne L. Newlon
Washington, DC

Benetta Y. Park
West Palm Beach, FL

Stephanie Perry
Bethesda, MD

Michaelle D. Rafferty
Reno, NV

Bruce S. Ross
Santa Fe, NM

Alan F. Rothschild, Jr.
Columbus, GA

Anita J. Siegel
Florham Park, NJ

Akane R. Suzuki
Seattle, WA

EC Liaison

Edward Jay Beckwith
Washington, DC

The Foundation Approved Three Grants

At its July 8, 2025, Business Meeting, the ACTEC Foundation Board approved three new grants supporting education, outreach, and equity in trust and estate law:

1. Funding was awarded for the **Dennis I. Belcher Young Leaders Program** which provides successful graduates of the two-year ABA RPTE Fellows Program with financial support to attend RPTE Section meetings, invitations and financial support to attend ACTEC Regional and State Meetings, as well as Stand-Alone sessions at the ACTEC Summer Meeting, and ACTEC/ALI CLE webinars at no cost. This grant will support the Eleventh Class of Young Leaders, building on a legacy that has already seen sixteen program alumni elected as ACTEC Fellows.
2. **Bet Tzedek Legal Services** received a Foundation grant to support the second year of its Postgraduate Fellow for Equity in Trust and Estate Law. In partnership with UCLA Law, this fellowship provides free, high-quality estate planning services to low-income and vulnerable individuals across Los Angeles County.
3. ACTEC's Communications Committee was awarded funding to continue the production of the **ACTEC Trust and Estate Talk podcasts** and the **ACTEC Estate Planning Essentials videos**. These resources serve as valuable tools for informing both professionals and the public about key topics in estate planning, fiduciary responsibility, and wealth transfer.

The Foundation Supports the Antonin Scalia Law School Symposium at George Mason University



On September 26, 2025, the **Symposium on the Law and Economics of Wealth Management and Transmission** was held at **Antonin Scalia Law School** at George Mason University, in Arlington, VA. This is the second Foundation grant awarded to George Mason University to support the Symposium of the **George Mason Law Review**. Organized by Academic Fellow Thomas P. Gallanis, the event convened leading scholars to present papers exploring key legal issues in wealth management and transmission. The papers will be published in Volume 33, Issue 2 of the *George Mason Law Review*.

2025 Mary Moers Wenig Student Writing Competition Winners Announced



First-Place
Chase Kristofer Duncan
Arizona State University
O'Connor College of Law



Second-Place
Amanda Covalleski
Temple University
Beasley School of Law



Third-Place
Pierson Broadwater
New York University
School of Law

On July 22, 2025, Foundation President John T. Rogers, Jr., and Co-Chairs of ACTEC's Legal Education Committee, Elizabeth A. Bawden and Gerry W. Beyer **announced the winners** of the 2025 Mary Moers Wenig Student Writing Competition. Three submissions from law students across the country stood out among the 32 entries evaluated by a panel of judges appointed by the Legal Education Committee, with four additional submissions receiving Honorable

Mention. T. Randolph (Randy) Harris, who chaired the judging process on behalf of the Committee, shares: "This year's competition saw an impressive number of submissions from law students across the country, and the overall quality of writing and analysis was exceptional, making the judging process quite challenging. The prize-winning entries stood out for their originality, clarity, and thoughtful engagement with both emerging and traditional trust and estate issues."

The ACTEC Foundation is Proud to Announce
**THE 2025-2027 CLASS OF
DENNIS I. BELCHER YOUNG LEADERS**



EMMA CONNOR
Chicago, IL



HARRY DAO
Menlo Park, CA



MOLLY E. DEPEW
New York, NY



**CLAY DAVIS
McKENNA**
Houston, TX



TYLER R. MURRAY
Dallas, TX

ACTEC Foundation President John T. Rogers, Jr. and ACTEC Diversity, Equity & Inclusivity Committee Chair Stacy E. Singer are pleased to announce the Eleventh Class of Dennis I. Belcher Young Leaders: Emma Connor, Harry (Ha) Dao, Molly E. Depew, Clay Davis McKenna, and Tyler R. Murray. Named in honor of ACTEC Past President Dennis I. Belcher, the program provides graduates of the ABA Real Property, Trust and Estate Law Section (RPTE) Fellows program with an opportunity to extend their leadership involvement through Foundation support.

The recipients will receive tuition-free access to ACTEC/ALI-CLE webinars, financial support for ABA/RPTE Section Meetings, and invitations to ACTEC Regional and State Meetings. Since its inception in 2015, the program has successfully prepared rising leaders, with sixteen past participants now elected ACTEC Fellows. The ACTEC Foundation is proud to support the **Dennis I. Belcher Young Leaders Program**, which fosters scholarship, promotes diversity and inclusivity, and cultivates future leaders in the trust and estate profession.



**The Foundation Is Now
Linked On ABA RPTE's
Young Fellows Web Page**

The ACTEC Foundation is pleased to announce that, in collaboration with the RPTE Young Fellows Program of the American Bar Association (ABA), The Dennis I. Belcher Young Leaders Program has been added to the Young Fellows web page. This addition links directly to The ACTEC Foundation's Program page highlighting The Dennis I. Belcher Young Leaders Program, along with a reciprocal link to the ABA RPTE Young Fellows page, offering those interested in the program information on how to become involved.

The ACTEC Foundation is honored to further enhance our cooperation with the RPTE Young Fellows program, and invites all to view both The Foundation's **Dennis I. Belcher Young Leaders** and **ABA RPTE Young Fellows** program pages.

The video series to help you establish a secure financial and legacy pathway for your future | actec.org/estate-planning

ACTEC
THE AMERICAN COLLEGE OF
TRUST AND ESTATE COUNSEL

Estate Planning Essentials
video series presents

**Steps to Take After
Winning the Lottery**

ACTEC Fellows Mark K. Harder and Marshall H. Peterson

This video was created by The American College of Trust and Estate Counsel (ACTEC) and funded by The ACTEC Foundation.

ACTEC Video Goes Viral

On September 6, 2025, the Powerball jackpot soared to \$1.787 billion—and with it, so did public curiosity. In response to this surge of interest, ACTEC's *Estate Planning Essentials* video, **"Steps to Take After Winning the Lottery,"** which outlines essential steps for lottery winners—from safeguarding the winning ticket to building a trusted advisory team and long-term estate plan—saw a dramatic spike in views. As people

sought guidance on navigating sudden fortune, the video drove **7,600** visitors to actec.org - in a matter of days, reinforcing ACTEC's reputation as a trusted source of expert advice. This is a powerful example of how content funded by The ACTEC Foundation plays a vital role in raising awareness of the College and the trust and estate profession.

ACTEC Foundation Donors

Thank you to all of the donors who have supported The ACTEC Foundation from June 5 through September 10, 2025.

Elizabeth A. Bawden

Turney P. Berry

Gerry W. Beyer

Tami Conetta

Anne W. Coventry

David M. English

Susan T. House

Jill Lebowitz

C. Kevin McCrindle

Deborah O. McKinnon

Julia B. Meister

Amy Michaud

Jill L. Miller

Karen M. Moore

Mary F. Radford

John T. Rogers, Jr.

Virginia Symmes Sheehan

Lee M. Stautberg

Luke Thomas Tashjian

WealthCounsel

IN MEMORIAM CONTRIBUTIONS

Mervyn S. Gerson

L. Henry Gissel, Jr.

Graham D. Holding

Darrel A. Morf

James A. Nepple

Robert D. Taisey

Brian F. Toohey

CONTRIBUTIONS IN HONOR OF

Gary B. Freidman

Mary F. Radford

PLEASE SEND YOUR
DONATION TODAY!

actecfoundation.org

THE AMERICAN COLLEGE OF
TRUST AND ESTATE COUNSEL

ACTEC[®]
FOUNDATION

ACTEC FOUNDATION HISTORY NOW AVAILABLE ONLINE

The ACTEC Foundation is pleased to share two new additions to actecfoundation.org: the Foundation's **History** and a listing of its **Past Presidents**. These updates offer a view into ACTEC's legacy and leadership over the years. The Foundation thanks all donors whose generosity has sustained its mission and made every milestone and grant possible. Your continued support helps preserve ACTEC's story and impact for future generations!

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
P.O. Box 825922
Philadelphia, PA 19182-5922

Be sure to include where any acknowledgment should be sent.

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 Senior 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@duncanpratt.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 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.

Charitable Donations from Your IRA – Individuals aged 70 and ½ or older can make tax-free charitable gifts directly from their IRA.

ACTEC FOUNDATION STAFF

ACTEC Foundation

901 15th Street, NW
Suite 525
Washington, DC 20005

T: (202) 684-8460

F: (202) 684-8459

actecfoundation.org

President

John T. Rogers, Jr.
(213) 986-3400
jrogers@rogerstrustlaw.com

Executive Director

Deborah McKinnon
(202) 684-8460
domckinnon@actec.org

Senior Membership and Foundation Director

Amy Michaud
(202) 684-8453
amy.michaud@actec.org

Controller

Deborah Oberst, CPA
(202) 684-8460
debbie.oberst@actec.org

Communications and Outreach Director

Rebecca Vandall
(202) 465-8270
rebecca.vandall@actec.org