



President's Message

I am very excited to share my first message as President of the ACTEC Foundation. As I step into this role, I truly thank all the Foundation's donors who make our work possible!

In particular, I want to thank the donors who supported the successful 2026 Home Run Derby. We exceeded our goal by over 25%, raising more than \$50,000 for Foundation-funded programs, including the Mary Moers Wenig Student Writing Competition. The deadline for the 2026 Competition just closed, and the winners will be announced soon. The Competition honors the late Mary Moers Wenig, an Academic Fellow of The American College of Trust and Estate Counsel (ACTEC), by encouraging and rewarding scholarly works in the trusts and estates fields.

Your donations to the Home Run Derby also support the ACTEC Trust and Estate Talk podcasts and the ACTEC Estate Planning Essentials videos. These are signature educational programs, aimed at trust and estate practitioners as well as members of the general public, and are funded through a grant from the Foundation.

Two recent podcasts in the ACTEC Trust and Estate Talk series highlight disaster preparedness. First, a personal

account of the impact of recovering from the Eaton Fire; followed by a discussion of resources to help after a disaster, including a Foundation-funded free handbook available on actecfoundation.org. Your donations to the Home Run Derby make resources like the Disaster Preparedness Guide widely available to those in need.

You'll find all these programs highlighted in this newsletter – I hope you enjoy learning more about them.

As I begin my stewardship as President of the ACTEC Foundation, my goal is to ensure that these and other resources remain free and available. A steady hand, wise financial management, and some fun in the form of engaging fundraisers like the Home Run Derby to bring enjoyment to our work are what I aim to bring to all of you.

Please help me by sharing your ideas and your enthusiasm, and please support the Foundation through your donations to keep the ACTEC Foundation healthy and financially strong!

Sincerely,

Lora G. Davis
ACTEC Foundation President

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The ACTEC Foundation Expands Timely Announcements



Following the successful 2025 refresh of actecfoundation.org, the ACTEC Foundation remains committed to advising the public of current and relevant content by publishing monthly announcements on the website. In May 2026, disaster relief planning resources made possible through the ACTEC Foundation were featured. A free downloadable resource made possible by an ACTEC Foundation grant - *Charitable Planning for Disaster Relief* - was highlighted. The guide provides attorneys and charitable organizations with practical guidance on key charitable, tax, and planning considerations, including best practices for structuring disaster relief efforts across a range of entities. In addition,

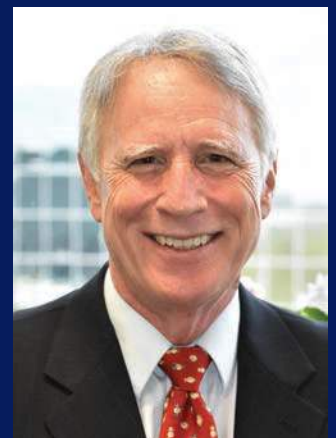
the announcement highlighted two companion episodes of the ACTEC Trust and Estate Talk podcasts. *Providing Charitable Assistance to Survivors of a Disaster* discusses the handbook's key charitable planning considerations, disaster relief structures, and practical guidance for attorneys and charitable organizations responding to disasters, and *Disaster Preparedness for Trust and Estate Planning* features ACTEC Fellow Jeff De Francisco, whose home was in the path of California's Eaton Fire, and whose first-hand experience emphasizes the importance of disaster preparedness and the critical role attorneys and advisors play before, during, and after a catastrophic event.

In April 2026, the renewal of ACTEC Foundation support for two of ACTEC's signature educational initiatives was announced—the ACTEC Estate Planning Essentials video series and the ACTEC Trust and Estate Talk podcast series. The programs were made possible through an ACTEC Foundation grant of more than \$46,000, approved during ACTEC's 2026 Annual Meeting. Launched in 2018, these two series have become essential to advancing ACTEC's educational mission, delivering trusted expert-driven content. With a growing library of over 375 podcasts and 92 highly viewed videos, the platforms continue to address timely T&E topics of importance to both professionals and the public. Produced by ACTEC's Communications Committee, the programs play a critical role in increasing awareness of T&E issues and reinforcing ACTEC's leadership in the T&E field. Communications Committee Chair John Challis shared, "On behalf of the Committee, I am incredibly grateful for the Foundation's support. The videos and podcasts are primary ways both trust and estate professionals and the general public engage with ACTEC and access its resources. Their continued success would not be possible without the ACTEC Foundation."



The ACTEC Foundation 2026 Spring Fundraiser: Home Run Derby Success!

The ACTEC Foundation congratulates Mickey "The Mick" Davis of Houston, Texas, for raising \$15,316 to win the 2026 Home Run Derby! Mickey shares: "Thank you to all of the Fellows who made contributions and for their incredible support throughout the Derby. It was an honor to be part of such a fun and competitive event. I'm grateful to have played a role in helping advance the important T&E programs that the Foundation makes possible." This year's Spring Fundraiser raised over \$54,000. The Foundation thanks all of this year's sluggers for participating and everyone who donated.





2026 Mary Moers Wenig Student Writing Competition



THIRTY-THREE PAPERS SUBMITTED FOR THIS YEAR'S COMPETITION

The 2026 Mary Moers Wenig Student Writing Competition is a flagship, annual legal writing competition made possible by the ACTEC Foundation. The 2026 competition closed on June 1, receiving 33 papers from students attending 25 law schools across the country. The competition will now move into the judging phase. The Foundation will announce the winners in July.

Heart of America Fellows Institute

of The American College of Trust and Estate Counsel

Class IV



Heart of America Fellows Institute Graduates Support The Foundation

The Heart of America Fellows Institute (HOAFI) was established in 2018 to educate attorneys from Arkansas, Iowa, Kansas, Missouri, Nebraska, and Oklahoma. Its mission is to cultivate the next generation of leaders in the T&E profession through intensive and collaborative educational sessions led by experienced subject-matter expert Fellows. This year, the fourth class successfully concluded its graduation session, celebrating the accomplishments of 34 dedicated class members. In a meaningful demonstration of their commitment to the T&E profession and its future, the members of Class IV collectively contributed \$1,000 to the ACTEC Foundation. The ACTEC Foundation warmly congratulates the graduates and extends heartfelt thanks for their support!

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Check – Make the check payable to "ACTEC Foundation" and mail to:

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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.

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