



President's Message

I could not begin my message without recognizing the momentous loss of L. Henry Gissel, Jr., ACTEC Foundation President from 2017-2020. I hope you will take a moment to read our tribute to this giant in the trust and estate world, and how his loss is being felt.

Henry was the President of the Foundation for only three years, but his legacy of excellent stewardship and insightful planning will be with us for years to come.

In this issue, you will find articles on several Foundation projects, including a recent grant The ACTEC Foundation made to The Commons Law Center. This grant will help provide estate planning services to lower income people in Portland, Oregon. Another exciting development I hope you will find time to read about – and follow on the Foundation's Facebook page and website – is the Voices of The ACTEC Foundation series. Narrated by people who have been positively impacted by ACTEC Foundation grants, these short but powerful videos will give you a portrait of the projects and people your donations are supporting. The Foundation's All College Campaign 2020 will focus on these stories. I hope that after reading my letter, which you will receive in early November, and watching these short videos, you will be inspired to join me in supporting The ACTEC Foundation's work with a generous donation.

Please also take a moment to look at the faces of the 2020 Mary Moers Wenig Student Writing Competition, and those of the 2020-2022 Class of Dennis I. Belcher Young Leaders. These rising students and young practitioners are being positively impacted by the donations made by you – the donors who make these programs possible. They are researching and writing articles on the trust and estate profession and learning leadership skills by participating in ABA/RPTE meetings. These young faces are the future of our profession.

Speaking of our profession, if you have not already done so, please subscribe to *The ACTEC Trust and Estate Talk Podcast* on **iTunes**, **Stitcher**, **SoundCloud**, **Spotify**, or your favorite podcast player. The Podcasts, another project funded by The ACTEC Foundation through your donations, discuss the latest trends and issues in trust and estate law. These resources are available complimentary to all.

I look forward to sharing more about the success of Foundation-funded research initiatives and other projects in the next newsletter. Your ongoing support makes these worthwhile projects possible.

Yours sincerely,

Jeffrey C. Thede

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Tribute to Immediate Past President L. HENRY GISSEL, JR.

The ACTEC Foundation was heartbroken to hear the news that Past President L. Henry Gissel, Jr. passed away from congestive heart failure on September 15. Henry was a champion of the Foundation, President from 2017 - March 2020, and his impact will be felt for generations.

Henry was a constant supporter of The Foundation, in both actions and financial donations. Most recently, he came from behind to place second on his horse Persistence in the inaugural Spring Derby. The ACTEC Foundation leadership encourages all Fellows to **read** about the many projects Henry initiated during his term as President and consider making an **In Memoriam Donation** to continue his good work.

Voices of the

THE AMERICAN COLLEGE OF
TRUST AND ESTATE COUNSEL
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ACTEC Fellow
Toni Ann Kruse -
Dennis I. Belcher
Young Leaders
Program



Professor Danaya Wright - An Empirical
Study of the Operation of Succession
Law in Non-Traditional Families.



ACTEC Fellow
Tye Klooster - Mary
Moers Wenig
Student Writing
Competition

VOICES OF THE ACTEC FOUNDATION

Be on the lookout for a series of videos that highlight the impressive projects supported by The ACTEC Foundation. Voices of The ACTEC Foundation reveals the impact of Foundation grants through short interviews with the recipients. Each video will focus on a different project and will be shared weekly on Wednesdays beginning October 21 through December.

Projects highlighted include the Mary Moers Wenig Student Writing Competition, Dennis I. Belcher ACTEC Young Leaders, academics from the University of Florida, University of Oregon, and The Commons Law Center, and the Executive Producers of the ACTEC Trust & Estate Talk and ACTEC Family Estate Planning Guide.

The valuable impact of The ACTEC Foundation is significant and you won't want to miss the opportunity to learn more.

Sixth class of Dennis I. Belcher Young Leaders

The ACTEC Foundation and the College are honored to welcome the sixth class of Dennis I. Belcher Young Leaders. Welcomed to the program in September 2020, these rising leaders in the trust and estate field will spend two years in the Young Leaders Program. The Program supports five diverse, young attorneys in the trust and estate field providing financial support to attend RPTE meetings. The meetings allow them to build leadership skills and network with other trust and estate professionals, which will ideally provide opportunities for leadership roles within the bar, opportunities to speak and opportunities to write for publications highly esteemed by ACTEC Fellows. Young Leaders are inducted following two years of participation in ABA/RPTE's Young Fellows program, giving them a total of four years of financial support.

The 2020-2022 Class of Dennis I. Belcher Young Leaders



Jessica Coutré
Freeborn
Chicago, IL



Jessica Diaz
Sherman & Howard
Denver, CO



Jacob Geierman
Georgetown University
Law Center
Washington, DC



Emily Plocki
Venable LLP
Washington, DC



Renee Salley
The Salley Law Firm
Marietta, GA

Three young leaders have been elected as ACTEC Fellows: Toni Ann Kruse of McDermott Will & Emery LLP in New York; JP Lee of Sojourner, Caughman & Thomas, LLC in South Carolina; and Raj Malviya of Miller Johnson in Michigan.

The ACTEC Foundation and ACTEC are proud to support these outstanding trust and estate practitioners!

Read more about the 2020-2022 Class of Dennis I. Belcher Young Leaders

MARY MOERS WENIG WRITING CONTEST

THE AMERICAN COLLEGE OF TRUST AND ESTATE COUNSEL

ACTEC

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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

The 2020 Mary Moers Wenig Student Writing Competition Winners



First-place Winner
Jack Spencer
Georgetown University
Law Center



Second-place Winner
Linda Nelte
University of San Diego
School of Law



Honorable Mention
Michelle Huggins King
Georgetown University
Law Center



Honorable Mention
Drake Frikken and Nabeal Sunna
Arizona State University,
Sandra Day O'Connor College of Law



2020 Mary Moers Wenig Winners

The ACTEC Foundation announced the 2020 Mary Moers Wenig Student Writing Competition Winners in late September. Five students were selected among 14 entries received; the entries were reviewed by a panel of judges appointed by ACTEC's Legal Education Committee.

The Foundation supports the annual legal writing competition to encourage law students to create scholarly works in the area of trusts and estates. The ACTEC Foundation has awarded more than \$142,000 to the competition over 15-years.

The 2021 Mary Moers Wenig competition is currently open to law students in good standing (full-time or part-time) who are currently or recently enrolled as a J.D. or LL.M. candidate in an ABA-accredited law school within the United States or its possessions. Please encourage law students in your network to participate. To read more about this year's competition, visit actecfoundation.org.

The Commons Law Center Grant

The ACTEC Foundation's Executive Committee is pleased to announce its support of **The Commons Law Center** with the award of a \$23,000 grant. The Commons Law Center is a 501(c)(3) nonprofit in North and Northeast Portland, Oregon that supports equal access to justice, and hiring and training of new attorneys under the mentorship of pro-bono attorneys and staff attorneys.

Part of The Commons Law Center's work is carried out through the Homeownership Asset Preservation Program in conjunction with the African American Alliance for Homeownership, which works to provide low-cost estate planning services to residents of North/Northeast Portland, Oregon. The grant will specifically support the work of a 2020 law school graduate to serve The Commons Law Center on a part-time basis over eight months to further this initiative.

As part of this program, The Commons Law Center intends to train attorneys of color, particularly African Americans, in order to increase the number of trust and estate attorneys of color in the profession. It is hoped that some of the attorneys trained by The Commons Law Center will eventually be eligible for nomination and election as ACTEC Fellows.

The Executive Committee of The ACTEC Foundation is proud to support this endeavor and looks forward to a successful partnership with The Commons Law Center.

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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 where any acknowledgement should be sent.

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.

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