

**Andrea Latchem (Chair)** is assistant vice president, alumni relations and senior philanthropy adviser at Syracuse University, Syracuse, New York. Previously, she served as executive director of development for gift and estate planning for Syracuse. Andrea has more than 20 years of experience in planned giving, including positions with the Salvation Army and two former positions with Syracuse University. She is a member of both CANARAS and the Planned Giving Council of Upstate New York and has served both councils as president. Latchem is also an associate member of the Estate Planning Council of Central New York. She is currently chairing the Planned Giving Task Force for the United Way of Central New York and is a member of the St. Camillus Foundation Board and the advisory board of the Skaneateles Festival. Latchem is chair of the 2007 NCPG Board of Directors.

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Council membership: Planned Giving Council of Upstate New York, CANARAS

**Jan S. Adams** is senior vice president of State Street Global Advisors (SSgA). She is responsible for managing the firm's Charitable Asset Management Group. She has more than 25 years of not-for-profit and financial services experience. Prior to joining SSgA in 2000, Ms. Adams was a first vice president for Mellon Private Asset Management. Before that, she was manager of Fleet Bank and Bank of New England's Not-for Profit Commercial Lending Division. As a volunteer, Ms. Adams has served on numerous boards, including the Planned Giving Group of New England, Boston Architectural Center, Boston YWCA, and Handel & Haydn Society. She is also a member of the Boston Estate Planning Council and NEAHP.

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Council membership: Planned Giving Group of New England, Planned Giving Group of Greater New York, National Capital Gift Planning Council, Pittsburgh Planned Giving Council

**Ann Barden** is gift planning director at Oregon Health and Science University in Portland, Oregon. She has served in a number of capacities at The San Francisco Foundation, as development director at The San Francisco SPCA, as the first Planned Giving Officer at Guide Dogs for the Blind and as associate director for planned giving at California Pacific Medical Center Foundation. Ann served on the NCPG 2004 Conference Committee. She is the past president of the Northern California Planned Giving Council and past interim president of the Golden Gate Chapter of AFP. She is the 2006 recipient of NCPGC's Phil Hoffmire Service Award. Ann has served on numerous boards including Pets Unlimited, The Animal Cancer Foundation and American Composers Forum. A frequent speaker at conferences and seminars, she has appeared on NPR and has been interviewed for numerous publications. Ann lives in Portland with her two dogs.

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Council membership: Northern California Planned Giving Council, Northwest Planned Giving Roundtable

**Robert F. (Rob) Buchheit**, CFP<sup>®</sup>, CFRE, AEP, is the senior divisional planned giving director at The Salvation Army Texas Division. He has a BBA in marketing from the University of Texas at Arlington. Mr. Buchheit has spent 23 years in gift planning, seven of those at the Salvation Army. His prior employment includes work at the Florida Hospital Foundation, Planned Giving Consultants, Inc., BeneFund, Inc., and

the Christian Broadcasting Network. Mr. Buchheit served as a board member of the North Texas Chapter of NCPG for six years, including a term as chapter president. He is the LEAVE A LEGACY® Program Chair for his council. Mr. Buchheit is also a member of the Association of Fundraising Professionals (AFP) and the National Association of Estate Planners and Councils (NAEPC).

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Council membership: North Texas Chapter of NCPG

**Bryan K. Clontz**, CFP, CLU, ChFC, AEP, CAP, is president of Charitable Solutions, LLC. He holds a BS in Business Administration from the College of Charleston, a Masters of Science in Risk Management and Insurance from Georgia State University, a Masters of Science in Financial Services from American College, and he has completed Ph.D. coursework in Consumer Economics at the University of Georgia. Mr. Clontz has spent 13 years in gift planning, three at his current position. He has served as vice president of advancement at The Community Foundation for Greater Atlanta, as director of planned giving at the National Office of the Boys & Girls Clubs of America, as director of planned giving at the United Way of Metropolitan Atlanta, and as a planned giving consulting and charitable planning specialist at RE Baxter & Associates. He has served as secretary, Membership Chair, and LEAVE A LEGACY® Chair of the Georgia Planned Giving Council. His other board positions have included: the Advancement Network Steering Committee, Community Foundations; National Southeastern Council on Foundations Increasing Philanthropy Committee; regional Planned Giving Design Center Editorial Board; American College's Chartered Advisor in Philanthropy Advisory Board; Merrill Lynch Community Charitable Fund National Marketing Committee Chair; and the American Funds/Community Foundation Alliance National Steering Committee.

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Council membership: Planned Giving Council of Northeast Florida

**Karen R. Cooper** is the regional representative, planned and major gifts (New England and New Jersey), for the Christian Children's Fund. Prior to working for CCF, she directed major and planned gifts for the Roman Catholic Diocese of Providence. Ms. Cooper began her career in development as the director of alumni and parent affairs at her alma mater, Salve Regina University in Newport, Rhode Island, and as the director of annual giving at Bridgewater State College in Bridgewater, Massachusetts. Ms. Cooper served on the board of the Planned Giving Council of Rhode Island for five years, including service as president. She has served as a mentor for Women in Development of Greater Boston and is a member of the Planned Giving Group of New England. Ms. Cooper has presented on a variety of planned giving topics regionally and nationally. Her speaking engagements include the International Catholic Stewardship Council (ICSC) and the National Conference on Planned Giving. Ms. Cooper is a member of the St. Theresa Parish Finance Council, the St. Philomena School Parent's Association, the CASE Conference Committee in Boston, the International Catholic Stewardship Council Advisory Team for Gift Planning, and the International Catholic Stewardship Council Foundations Conference Planning Committee.

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Council membership: Planned Giving Council of Rhode Island, Planned Giving Group of New England

**Tom Cullinan** is a gift planning specialist and consultant working with national and regional exempt organizations and the individuals who give to them. He has been directly involved in the field more than 15 years and has conducted hundreds of seminars and lectures for gift planning practitioners, charity boards and executives, and legal and financial services professionals. Cullinan is founder of the Academy of Gift Planning and was chosen by the late Bob Sharpe, Sr. to be his successor as director of the National Planned Giving Institute on the faculty of the College of William & Mary. He is a founding board member of Charitable Accord, a sponsor of the American Council on Gift Annuities, has been a member of planned giving councils in Baltimore, Houston, Virginia, Washington DC, and now serves as president of the Planned Giving Council of Nebraska. Cullinan is a founding member of the National Board of Consultants for *Planned Giving Mentor* and serves as an author and editorial advisory board member for its sister publication *Planned Giving Today*.

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Council membership: Planned Giving Council of Nebraska

**Erik D. Dryburgh** is a principal partner at Silk, Adler & Colvin. He had previously worked at Moerschbaecher & Dryburgh, Trucker, Moerschbaecher, Huss & Klamm, McCutchen, Doyle, Brown & Enersen, and Arthur Andersen. Mr. Dryburgh graduated from the Boalt Hall School of Law at the University of California, Berkeley. He also holds a degree in finance from the University of Wisconsin. He has spent 17 years in gift planning, including 11 at his current position. He holds memberships in the American and California Bar Associations. He is also a member of the board of directors of the San Francisco Estate Planning Council, and is a Planned Giving Committee member for KQED-TV. Mr. Dryburgh is a past member of the board of the Northern California Planned Giving Council, which awarded him the Phil Hoffmire Service Award. He is a Fellow of The American College of Trusts and Estates. He has authored numerous articles on planned giving for publications including *The Journal of Gift Planning*, the *Journal of Taxation of Exempt Organizations*, and is co-editor of *The Charitable Gift Planning News*.

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Council membership: Northern California Planned Giving Council

**Shari M. Fox** is assistant vice president and director of gift planning at the University of Michigan, in Ann Arbor, Michigan. Previously, she was director of gift planning for the University of Cincinnati Foundation in Cincinnati, OH. Prior to joining UC, she was president of Beech Acres Foundation and also served as endowment specialist with the Jewish Federation of Cincinnati. Fox is a former chair of the board of directors of the National Committee on Planned Giving and is a member and past president of the Greater Cincinnati Planned Giving Council. She has served on the boards of directors of the Cincinnati Therapeutic Riding and Horsemanship, and the Community Resource Center, and is a member of the editorial advisory board for the monthly newsletter *Planned Giving Today*.

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Council membership: Planned Giving Roundtable of Southeast Michigan

**James E. Gumpert** is the director of planned giving for the Boys & Girls Clubs of America Southwest Region. A New York native, he holds a BS in psychology from Cornell University and a Masters in Public Administration from the University of Colorado. His professional career has included more than 25 years of fundraising

experience serving public television, the MS Society of Colorado, the Arthritis Foundation, and the American Red Cross. For the past five years, Gumpert has been a board member of the Colorado Planned Giving Roundtable, and was president in 2004. Gumpert is currently the chair of his council's Nominating Committee, co-chair of the LEAVE A LEGACY® Committee, and a member of the Summer Symposium and Outreach Committees. Gumpert is an avid baseball fan and fisherman, and escapes whenever he can to his cabin in the Colorado mountains.

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Council membership: Colorado Planned Giving Roundtable

**Russell Howes (Chair-elect)** is vice president for legal affairs and planned giving for the University of Wisconsin Foundation in Madison, Wisconsin, where he serves as general in-house counsel, is responsible for the operation of the planned giving program and also manages the regional major gifts unit. He has more than 19 years of planned giving experience and has been in his current position for 16 years. Russell is a founding member and past president of the Wisconsin Planned Giving Council. He was elected to the board of directors of the National Committee on Planned Giving in 2004.

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Council membership: Wisconsin Planned Giving Council

**Heidi B. Jark (Conference Program Chair)** is vice president and manager of the foundation office at Fifth Third Bank in Cincinnati, Ohio, where she is responsible for overseeing the administration and investment management of corporate and family foundations. For the past five years, she was Fifth Third's planned giving manager, overseeing the day-to-day administration and investment of planned gifts. Jark is a graduate of Valparaiso University and its School of Law and served as its planned giving manager after retiring from the practice of law. Jark is a member and past president of the Greater Cincinnati Planned Giving Council. She is the current chair of the NCPG Conference Program Committee. Jark's community involvement includes board service to her local American Cancer Society chapter, the Ohio Grantmakers Forum, and the WAVE Foundation. She is an incoming board member for her local YWCA chapter, and has served in various leadership capacities at Ascension Lutheran Church, the Fine Arts Fund of Cincinnati, and the Valparaiso University Alumni Association.

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Council membership: Greater Cincinnati Planned Giving Council

**Tanya Howe Johnson (Ex-officio)** is president and chief executive officer of the National Committee on Planned Giving Inc. (NCPG) where she has served for 15 years. As an association management consultant since 1993, Johnson has worked with a variety of nonprofit organizations on leadership training, staff training, and strategic planning. She holds the Certified Association Executive (CAE) designation and is a past recipient of the Indiana Society of Association Executives Association Executive of the Year award.

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Council membership: Planned Giving Group of Indiana

**Thomas P. Lockerby** is the associate vice president for capital giving at Boston College. He is a graduate of Harvard College and has spent 12 years in gift planning, including two years at his current position. Mr. Lockerby has also served as associate vice president for capital giving at Boston College, director of gift planning at Dartmouth College, relationship manager at Kaspick & Company, vice president, PG Calc Incorporated, and director of development relations at Harvard Business School. He is currently a member of the Planned Giving Group of New England (PGGNE), and in the past has held membership in the Upper Valley Planned Giving Council. He has served on PGGNE's Nominating Committee, and his leadership positions with the council include president, treasurer, and the director of communications. Mr. Lockerby has served NCPG as a member of the board Nominating Committee, on the Task Force on Counting and Reporting Charitable Planned Gifts, and the Technology Task Force. He also served on the board of governors for the Harvard Club of Boston.

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Council membership: Planned Giving Group of New England

**Mark L. Melson (Treasurer)** is chief resource development officer for Big Brothers Big Sisters of North Texas in Arlington, Texas. Previously, he was the director of major gifts and gift planning for the Harris Methodist Health Foundation. Prior to joining Harris Methodist, he was the director of development for the Arthritis Foundation in Louisiana. Melson has been designated as a Certified Specialist in Planned Giving (CSPG) from California State University, Long Beach, and is a Certified Fund Raising Executive (CFRE). He currently serves as the past president of the Lone Star Chapter of the National Committee on Planned Giving, as a director on the Colleyville Library Foundation Board, and as commissioner for the Colleyville Ethics Commission. Mr. Melson is the former Louisiana State Vice-Chair for Combined Health Charities and the former Louisiana State Secretary for the National Voluntary Health Agencies. In 2003, he was named by the Fort Worth Business Press as one of the top "40 Under 40" business executives in Tarrant County.

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Council Membership: Lone Star Chapter of NCPG.

**Gary Pforzheimer (Secretary)** is the founder of PG Calc Incorporated, which he formed in 1985. He has been involved in planned giving for more than 20 years, first with Harvard University's planned giving office. In May of 1995, Mr. Pforzheimer became the seventh recipient of the David M. Donaldson Distinguished Service Award, an award given by the Planned Giving Group of New England (PGGNE) to individuals for outstanding contributions and distinguished service to the planned giving community. He has served as vice president for programming, treasurer and director of communications for PGGNE.

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Council membership: Planned Giving Group of New England, Planned Giving Group of Greater New York.

**Philip M. Purcell** is the vice president for planned giving and endowment resources at the Ball State University Foundation. He received his BA degree from Wabash College in 1981 (magna cum laude) and his JD and MPA degrees (with honors) from Indiana University in 1985. He has consulted for various charitable organizations, including the Lilly Endowment's GIFT program. His consultancy focuses on philanthropy and nonprofit governance. He has spoken on these topics before many national organizations. His articles have appeared in The Journal of Gift Planning,

Planned Giving Today, CASE Currents, Planned Giving Design Center and other publications. Purcell serves on the editorial advisory board for Planned Giving Today and as a volunteer the Tax Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes States region). He teaches a course on law and philanthropy as adjunct faculty for the Indiana University School of Law (Bloomington) and he is a faculty member of the Indiana University Center on Philanthropy's Fundraising School. Purcell is past president of the Planned Giving Group of Indiana.

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Council membership: Planned Giving Group of Indiana.

**Jean Vukas Roberts** is director of gift planning for The Saint Paul Foundation. An 18-year veteran with the organization, she specializes in planned giving and works primarily with individual donors and their advisors to complete charitable gifts as part of their overall estate plan. Ms. Roberts is the immediate past chair of the Minnesota Planned Giving Council. She is a member and former board member of the Association of Fundraising Professionals, Minnesota chapter. Ms. Roberts is an active volunteer in her community and has assisted a number of nonprofit organizations begin and build their endowments.

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Council membership: Minnesota Planned Giving Council.

**Patricia M. Shanahan** is the director of gift planning at the Chicago Botanic Garden. She holds a BA in Economics from Carleton College. She has worked in charitable gift planning for close to 10 years, including five in her current position. Ms. Shanahan has also served as director of planned giving for Lake Forest College, in Lake Forest, Illinois. She has been a member of the Greater North Shore Estate and Financial Planning Council since 2003. She is a member of the Chicago Council on Planned Giving, where she has served on the board of directors, as president, and as chair of the Nominating and Membership Committees. Ms. Shanahan is currently serving on the NCPG Conference Program Committee. She is a member of the Friends of Jens Jensen Park Steering Committee, and served on the Northfield, Minnesota Area United Way Board of Directors.

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Council membership: Chicago Council on Planned Giving

**Eric I. Swerdlin** is CEO of ChesterCAP, LLC, in Cedar Knolls, New Jersey. Previously, Swerdlin founded and was CEO of Swerdlin White Huber, Inc. (SWH), a firm dedicated to investment management, administration, and program support for planned giving programs at nonprofit organizations. In 1999, SWH was sold to the Bank of New York, where Swerdlin remained and was a division head for three years. Swerdlin has spoken at numerous planned giving councils, the National Conference on Planned Giving, and the ACGA Conference. His articles have appeared in *The Journal of Taxation*, *The Journal of Gift Planning*, and *Planned Giving Today*. Swerdlin has discussed planned giving and philanthropy on CNN, Fox News Network, and Bloomberg Television and has been quoted on topics relating to charitable giving in *The Wall Street Journal*, *The Chronicle of Philanthropy*, *Forbes*, and many other print publications. Swerdlin lives in Chester, New Jersey, with his wife Hallie and their three daughters. He holds a BBA in International Business from The George Washington University.

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Council membership: Planned Giving Group of Greater New York.

**Peter Witherell** is director of planned giving resources at the American Cancer Society's national office. Prior to his current position, Witherell spent 12 years as vice president for planned giving for the American Cancer Society's Florida division. A graduate of Florida State University, he has spent a total of 18 years in planned giving. Witherell has served as president of the Georgia Planned Giving Council and was a charter board member and past president of the Tampa Bay Area Planned Giving Council. Witherell has attended every National Conference on Planned Giving since 1989, and has served on NCPG's Research Committee and Bequest Estimating Task Force. Witherell has also served on the boards of the Atlanta Vineyard Church and Southern Scholarship Foundation. He currently sits on the board of directors for the Rwanda Children's Hospital. He was also assistant treasurer of the AFP Sun Coast Chapter; and was assistant treasurer of the ACS Florida division.

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Council membership: Georgia Planned Giving Council.