

National Committee on Planned Giving®
2008 Leadership Assembly

2008 NCPG Board of Directors Biographies

► **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. Barden served on the 2004 NCPG 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, and is the 2006 recipient of NCPGC's Phil Hoffmire Service Award. Barden 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. Barden lives in Portland with her two dogs.

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

► **Robert F. (Rob) Buchheit**, CFP, CFRE, AEP, is assistant vice president for development/gift planning at the University of North Texas in Denton, Texas. Previously, he was 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. 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. He 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 and also a member of the Association of Fundraising Professionals (AFP) and the National Association of Estate Planners and Councils (NAEPC).

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. 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.

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. 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. She served on the board of the Planned Giving Council of Rhode Island for five years, including service as president. Cooper has served as a mentor for Women in Development of Greater Boston and is a member of the Planned Giving Group of New England. She 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. 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.

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

► **Erik D. Dryburgh** is a principal partner at Adler & Colvin. He had previously worked at Moerschbaeher & Dryburgh, Trucker, Moerschbaeher, Huss & Klamm, McCutchen, Doyle, Brown & Enersen, and Arthur Andersen. Dryburgh graduated from the Boalt Hall School of Law at the University of California, Berkeley and 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 and is also a member of the board of directors of the San Francisco Estate Planning Council, as well as a planned giving committee member for KQED-TV. Dryburgh is a past member of the board of the Northern California Planned Giving Council, which awarded him the Phil Hoffmire Service Award and 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*.

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, Ohio. 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 of the Planned Giving Roundtable of Southeast Michigan. 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*.

Council membership: Planned Giving Roundtable of Southeast Michigan

► **James E. Gumpert** is the senior director, planned giving club services 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. He 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.

Council membership: Colorado Planned Giving Roundtable

► **Russell N. Howes** 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. Howes 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, where he now serves as chair of the 2008 board.

Council membership: Wisconsin Planned Giving Council

► **Heidi B. Jark** 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. She is a member and past president of the Greater Cincinnati Planned Giving Council and was the 2007 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.

Council membership: Greater Cincinnati Planned Giving Council

► **Michael Kateman** is executive director of development and alumni services at Columbia College in Columbia, Missouri, and is responsible for fundraising activities such as planned giving, the annual fund, donor relations and capital campaigns. Previously, he was executive director for arts development and planning at the University of Missouri-Columbia. His diverse marketing, public relations and fundraising background includes healthcare, the arts, human services and higher education. Kateman is a nationally recognized speaker on marketing and advertising planned giving techniques. He served as NCPG Education Chair for two years, and is a member of the Mid-America Planned Giving Council. Kateman is a graduate of the University of Missouri-Columbia, with an MA from the School of Journalism and a BS in Business Administration—Marketing. He attended the Universidad Iberoamericana in Mexico City.

Council Membership: Mid-America Planned Giving Council

► **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.

Council membership: Planned Giving Group of New England

► **Gary Pforzheimer** 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, 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.

Council memberships: 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 in Muncie, Indiana. 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 and has spoken on these topics before many national organizations. Purcell's articles have appeared in *The Journal of Gift Planning*, *Planned Giving Today*, *CASE Currents*, *Planned Giving Design Center* and other publications. He serves on the editorial advisory board for *Planned Giving Today* and as a volunteer for 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.

Council membership: Planned Giving Group of Indiana.

► **Brian M. Sagrestano** is founding and managing director of Gift Planning Development, LLC, in Warrington, Pennsylvania. Sagrestano's client-centered philosophy ultimately drew him into gift planning full-time, where he led the gift planning efforts for the University of Pennsylvania, Middlebury College and Meridian Health Affiliated Foundations, following major gift and gift planning positions at Clarkson University and Hamilton College. After many years of providing pro-bono gift planning consulting services, Sagrestano and his wife Christine formed Gift Planning Development in 2007.

Council memberships: Gift Planning Council of New Jersey, Planned Giving Council of Greater Philadelphia

► **William D. Samers** is vice president of planned giving and endowments for UJA-Federation of New York, the largest local not-for-profit in the country, where he leads a 20 person gift planning department. For the past nine years he worked for the American Committee for the Weizmann Institute of Science (ACWIS) most recently as the vice president of gift development and compliance. He recently completed his two year term as president of the Planned Giving Group of Greater New York (PGGGNY), and currently sits as one of sixteen members of the board of directors of National Committee on Planned Giving. He is a former member of the faculty of the New York University Center for Philanthropy and Fundraising. Samers has published in the *The Journal of Gift Planning* and has presented to the National Conference on Planned Giving, and the Planned Giving Councils of New York, San Francisco, Houston, New England and Connecticut, as well as to the Association of Fund Raising Professionals (AFP). Samers is also a co-developer of tools for measuring fundraising effectiveness and managing campaigns.

Before joining ACWIS, Samers was affiliated with the American Society for the Technion. Previously, he was an associate at Heidell, Pittoni, Murphy & Bach, P.C. Samers is a graduate of the University of Pennsylvania and received his J.D. degree from Boston University Law School.

Council membership: Planned Giving Group of Greater New York

► **Patricia M. Shanahan** is the director of gift planning at the Chicago Botanic Garden. She holds a BA in Economics from Carleton College and has worked in charitable gift planning for almost 10 years, including five in her current position. 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. Shanahan 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. She is currently serving on the NCPG Conference Program Committee. Shanahan is a member of the Friends of Jens Jensen Park Steering Committee, and served on the Northfield, Minnesota Area United Way Board of Directors.

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.

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. He 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. Witherell was also assistant treasurer of the AFP Sun Coast Chapter; and was assistant treasurer of the ACS Florida division.

Council membership: Georgia Planned Giving Council.

► **Craig C. Wruck** is senior vice president of development and alumni relations for Hazelden in Minneapolis, Minnesota. Most recently, he was associate vice president of development & director of gift planning at University of Minnesota Medical Foundation. He is former director of client development for Kaspick & Company, has served as director of gift planning for the University of Minnesota and vice president of development for The Saint Paul Community Foundation, as well as vice president for U. S. Trust Company and national manager of Charitable and Nonprofit Services for U.S. Bank, where his work focused on the needs of individual donors and charitable organizations. His career in development also includes experience at William Mitchell College of Law in Minnesota, and Claremont University Center in California.

Wruck is past chair of the National Committee on Planned Giving (NCPG) and currently chairs its Government Relations Committee. In 1993, he was chair of the Sixth National Conference on Planned Giving and is a frequent speaker and writer on planned giving topics.

In the fall of 2002 he was presented with a Distinguished Service Award from the National Committee on Planned Giving in recognition of his work in the field. In 1999 he was recognized with a David M. Donaldson Distinguished Service Award presented by the Planned Giving Group of New England. Wruck is past president of the Minnesota Planned Giving Council and was a founding member of the Editorial Advisory Board of the newsletter *Planned Giving Today*. Beyond his professional involvement, Wruck serves as a member of the Board of Education for South Washington County Schools in Minnesota.

Wruck holds an MBA from the University of St. Thomas and a bachelor's degree in journalism from the University of Utah.

Council membership: Minnesota Planned Giving Council.

► **Chris Yates** is director of Stanford University's Office of Planned Giving. He earned his J.D. from the University of Chicago, and then joined the law firm of Morrison and Foerster, where he practiced for three years. Yates joined Stanford in 1989 as associate director of undergraduate admission. Prior to leading the Planned Giving team, he served as associate director of Planned Giving at Stanford and as director of gift and estate planning for the California Institute of Technology. Yates is a past chair of NCPG.

Council membership: Northern California Planned Giving Council