Partnership for Philanthropic Planning
2010 Board of Directors Slate

**Jonathan D. Ackerman** represents donors and tax-exempt organizations on a national basis through his firm, Law Office of Jonathon Ackerman, LLC. For the past 24 years, he has practiced in the areas of charitable gift planning, tax-exempt organizations, charitable solicitations laws, federal corporate and partnership taxation, estate planning and probate, IRS practice and procedure, real estate and business formations and transactions.

Jonathon is a member of the American Bar Association and Maryland State Bar Association, Taxation and Real Property, Probate and Trust Sections and has served on the Ad Hoc Committee on Ethics and Accountability in the Nonprofit Sector for the Maryland Association of Nonprofit Organizations. He attended the University of Maryland, the University of Baltimore School of Law, and obtained his Masters of Laws in Taxation at Georgetown University Law Center. Jonathan was a member of the Board of Directors of the National Committee on Planned Giving (NCPG), program chair of the 2000 National Conference on Planned Giving, and 2002 chair of the board.

Jon is a member of the **Chesapeake Planned Giving Council**, where he has served on the board and as council president.

**Melanie Schnoll Begun** is a managing director and head of Morgan Stanley Smith Barney's Philanthropic Services. Melanie has served as a philanthropic counselor to donors, foundations and family offices for over 16 years. She works with the firm's ultra-high net worth clients to develop areas of focus for their philanthropy; engage multiple generations in their foundation's governance, programming and evaluation; design customized domestic and international grant-making portfolios and gift agreements; facilitate giving circles and retreats; and advise on the formation of tax-exempt organizations as well as their

dissolution or merger. Melanie is a vice president of MSSB's Global Impact Funding Trust, Inc., the nonprofit organization sponsoring the firm's donor-advised fund,

Melanie is on the board of the Juvenile Diabetes Research Foundation, and on the advisory boards of Girls, Inc., the Salvation Army, and the Endowments and Foundations advisory board for the Investment Management Consultants Association (IMCA).

Melanie is member of the **Philanthropic Planning Group of Greater New York** (formerly the Planned Giving Group of Greater New York).

Jill Dodd is a partner at the law firm of Manatt, Phelps & Phillips, where she heads up both the Nonprofit Group and the Family Wealth Transfer Group. For the past 21 years, her practice has focused on the representation of charitable organizations in all aspects of the law and the representation of very high net worth families with respect to estate and gift planning, with a particular emphasis on charitable giving. Jill spends a substantial part of her practice working with both donors and charities to structure complex charitable gifts.

Jill's honors and awards include *Worth* magazine's "Top 100 Lawyers Advising High Net Worth Clients", 2007 and 2008; California Super Lawyer, 2007, 2008; and The Best Lawyers in America, 2005 - 2009. She earned her undergraduate degree from Oberlin College, Master's from Harvard (in American History) and law degree from the University of California, Berkeley.

Jill is a member of the **Northern California Planned Giving Council**, has been on the board since 2002, and served as president in 2007 and 2008.

Sharon Kloss Hogan has over 17 years of experience in major gifts and philanthropic planning. She is the director of gift planning at the University of Portland (Oregon). Prior, she served in gift planning positions at Oregon State University Foundation, National Multiple Sclerosis Society, and the Salvation Army. Sharon has a J.D. from Lewis & Clark Law School, Portland, Oregon. She is past chairman of First United Methodist Church Board of Trustees and a past board member of Parents Anonymous. Sharon was a member of the NCPG Conference Program Committee in 2006.

Sharon is a member of the **Northwest Planned Giving Roundtable** where she has served on the board of directors, as president, and as chair of the Annual Conference Committee.

**Larry Stelter** is president and CEO of The Stelter Company, a leading source on gift planning marketing for 2,000 print clients and 1,300 Web clients nationally. Larry has almost 40 years of experience as a marketing specialist and is a frequent speaker and author on gift planning topics, including presentations at the National Conference on Planned Giving. The Stelter home office is located in Des Moines, Iowa, and has regional marketing consultants nationwide. Larry is a graduate of the University of Iowa.

Larry is a member of the **Mid-Iowa Planned Giving Council** and the **Minnesota Planned Giving Council**.

 **Robert E. Wahlers** is associate vice president for major & planned giving for Virtua Foundation in Marlton, New Jersey. Robert has worked in financial and estate planning for 20 years including the last 17 in nonprofit fundraising with the Boy Scouts of America and the American Cancer Society. He is President of the New Jersey Chapter of the Association of Fundraising Professionals, and is a member of the Association of Donor Relations Professionals. He holds a Master of Science degree in Human Development & Leadership with a concentration in Nonprofit Management from Murray State University and a BA Degree in Psychology from Muhlenberg College.

Robert is a member of the board of the **Gift Planning Council of New Jersey**, where he has been a member of the Annual Conference Committee since 2002 and served as the conference chair in 2006 and 2007.