

2020 Carolinas Planned Giving Conference

September
2nd & 3rd
Virtual Format
via Zoom



SPEAKER BIOS:



Greg Abeyounis, CFRE, CGPA, MA '06 is Senior Associate Vice Chancellor for Development at East Carolina University. His responsibilities include: working with the East Carolina University Foundation, Inc., the East Carolina University Medical & Health Sciences Foundation, Inc., East Carolina Alumni Association and the East Carolina University Educational Foundation, Inc. (Pirate Club) with all estate planning gifts. This role also oversees and leads the ECU

Annual Giving Program which works across the ECU Foundation, Inc. the ECU Medical & Health Sciences Inc. This office sets the strategy and distributes all forms of centralized annual giving that include solicitations via phone, direct mail, electronic channels, social media and crowdfunding for alumni, friends, faculty and staff and various constituent groups that support ECU annually. At ECU Greg has held the positions of Major Gift Officer, Director of Planned Giving, Assistant Vice Chancellor for Development, Associate Vice Chancellor for Development and Senior Associate Vice Chancellor for Development. At Barton College, Greg started as the Director of the Annual Fund handling annual solicitations via telephone, mail and personal contact and then moved to the Director of Development position where he managed the Annual Fund, the Alumni Office while raising major and planned gift for endowments and capital projects.



Joe Bull is a principal with Philanthropy Advisory Council. With 35 years of experience in the philanthropic arena, he has served as Assistant Vice President of Development at Carnegie Mellon University, Senior Vice President for Community Engagement at the Columbus Zoo and Aquarium, and as Senior Philanthropy Officer for Global Priorities at The Nature Conservancy. Joe provided 16 years of service to his alma mater, The Ohio State University, primarily as Director of Planned Giving, and he began his career at Duke North Carolina State Universities. He was the 2005 Board Chair of the National Association of Charitable Gift Planners and is currently President-elect of the American Council on Gift Annuities Board of Directors. He was a member of the Editorial Advisory Board for *Planned Giving Today* for 15 years and is past President of the Central Ohio and North Carolina Planned Giving Councils. He is admitted to the Ohio and North Carolina bars.



Neil Brown received a Masters of Accountancy, magna cum laude, from The University of South Carolina in 1993 and Bachelors in Business, magna cum laude, from The University of South Carolina in 1992. He is a CERTIFIED FINANCIAL PLANNER™ practitioner and Certified Public Accountant (CPA). Neil has significant experience in financial planning and brings a wide variety of financial service and tax expertise to BFS. He advises clients on various personal financial planning issues including distribution, retirement, income tax, insurance, education, investment and estate tax. He is a member of the American Institute of CPAs, the South Carolina Association of CPAs, the Columbia Estate Planning Council, the Columbia Tax Study Group and the National Association of Personal Financial Advisors.

He is also the Program Coordinator for the CFP® Certification Education Programs at Midlands Technical College. He is also a national instructor for Keir Educational Resources' Review for the CFP® Certification Examination. He has also been quoted in and authored articles in Bloomberg Wealth Manager, Research Magazine, Midlands Woman, The State, Financial Advisor, Kiplinger's Personal Finance and Financial Planning.

Prior to joining BFS, Neil headed the financial planning department at a large fee-only financial planning firm in Columbia. Prior to that, Neil was a senior consultant with the Carolinas Financial Counseling Services Practice of Deloitte & Touché in Charlotte, North Carolina where he spent the majority of his time advising executives and employees of a Fortune 500 company on retirement, insurance, investment, income and estate planning.



Jim Hackney, Executive V.P. for Advancement, Kanuga

Jim is a native of North Carolina, a collector of pottery and a Renaissance man that worked nearby Kanuga as a teen at Camp Tekoa. After serving as a development officer at his alma mater, Wofford College, he led advancement at the Mint Museum in Charlotte. He then joined one of the nation's premier capital consulting firms, Alexander Haas of Atlanta. After spending almost two decades in that position and assisting hundreds of clients throughout the United States, he joined the advancement efforts of Yale University at Yale Divinity School where he served for over five years before joining the Kanuga team in June 2019. Jim spends his spare time with his husband Scott and their golden retriever Beecher.



Kent Weimar is Director of Trusts, Estates & Gift Planning at Parkland Foundation where he works with donors and their advisors to make estate gifts, create endowments, or make donations with assets other than cash. His extensive expertise in institutional advancement comes from 40 years of experience in community based health care, higher education, cultural institutions, international healthcare, youth development, and social service organizations.

Kent has been actively involved in CGP for 17 years including leadership roles at the Chicago Council of Planned Giving and the Dallas Council of CGP, where he is a past president.



Phyllis Silverstein serves as Senior Vice President and Senior Regional Fiduciary Manager of Philanthropic Services within The Private Bank. Wells Fargo Philanthropic Services helps charitable individuals, families, and nonprofit organizations work toward their unique goals by providing specialized advisory services. Phyllis leads a team of experienced specialists that provides philanthropic advice to Wells Fargo

clients throughout the Southeast and South Mid-Atlantic Regions. She is responsible for enhancing our philanthropic offering to clients, helping her team deliver exceptional client service, and managing risk within her region.

Phyllis has over 35 years of professional fundraising and development experience. Prior to joining Wells Fargo, Phyllis spent 8 years as the Vice President of Planned Giving & Endowment for the Jewish Federation of Greater Atlanta where she developed a comprehensive endowment program involving donors, professional advisors and community organizations. Prior to moving to Atlanta, Phyllis held senior resource development positions at the Greater Miami Jewish Federation and the Jewish Federation of Broward County.

Phyllis graduated cum laude, with a Bachelor of Arts in Sociology from Florida Atlantic University. Phyllis obtained a Certificate in Financial Planning from the University of

Georgia, and has been awarded the CERTIFIED FINANCIAL PLANNER™ designation. Phyllis is a Chartered Advisor in Philanthropy®, a designation awarded by the American College of Financial Services. Phyllis has served as a subject matter expert for the CFP Board Exam Review and is a member of the Estate Planning Council of North Georgia. She has served as President and Board member of the Georgia Planned Giving Council. Phyllis currently serves on the Board of EduHousing as well as a Board member of the National Hadassah Foundation and holds the position of Treasurer. Phyllis lives in Marietta, GA and has 5 children.



Tim Prosser joined TIAA KASPICK in 2009 with nearly 20 years of experience in legal practice and financial services. Prior to joining TIAA-CREF Trust Company in 2000, Mr. Prosser practiced law in the areas of estate planning, estate and trust administration, charitable giving, and business succession planning with the firms of Sonnenschein Nath & Rosenthal and Armstrong Teasdale Schlafly & Davis in St. Louis. Mr. Prosser served on the board of the National Association of Charitable Gift Planners and was chair of the CGP National Conference. He is a past board member and president of the Saint Louis Planned Giving Council, and recipient of the Council's Founder's Award. He is a frequent speaker on charitable and estate planning topics. Mr. Prosser received his JD and MA degree in Public Administration from St. Louis University, and his BA in Russian Area Studies from Loyola University, New Orleans.



June Bradham, CFRE is the Principal of Change Develop Move CDM), formerly Corporate DevelopMint, an organizational development and fundraising consulting firm she founded in 1987. Under her leadership, the Corporate DevelopMint team served over 200 nonprofits across the United States and Australia. In March 2017, June became a Strategic Consultant for Blackbaud Healthcare Solutions where she uses her experience as a thought leader to refine products and build bridges with healthcare leadership, physicians, and development offices. Recognized for her expertise in strategic planning, innovative fundraising, and board dynamics, June is an internationally sought-after speaker whose recent engagements have included plenary and keynote addresses at prestigious domestic and international conferences held by the Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy, the Council for the Advancement and Support of Education, and Blackbaud's Conference for Nonprofits, BBCON. In addition to the numerous articles in national publications she contributes to each year, June wrote a monthly column for the Charleston Regional Business Journal, was named the Journal's "Most Influential Woman CEO," and served as its recent keynote speaker. June's groundbreaking and insightful book on board dynamics, *The Truth about What Nonprofit Boards Want: The Nine Little Things that*

Matter Most, was published by Wiley and is one the industry's most talked about books. June and her team have worked in higher education, independent schools, healthcare, and community organizations. June's deep commitment to the growth and success of nonprofit organizations is underscored by her years of volunteer board experience, including service on a number of healthcare and education boards, community organizations like the Spoleto Festival USA and the Coastal Community Foundation, Chambers of Commerce, and industry association boards. She is a past president of the board of the South Carolina Association of Nonprofit Organizations, member of AFP – International, and the University of South Carolina's Moore School of Business, a top ranked business school. Her most recent interest in pro bono work is reflected in her appointment to the International Board of CreateAthon™ known for serving nonprofits through pro bono professional projects. June holds a BA degree from Columbia College and is a certified fundraising executive (CFRE). She has also completed the Harvard University Governance Education program in Cambridge, Massachusetts.

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