Kelli Smith, CFRE
Director of Philanthropy
St. Mary's Foundation
Grand Rapids, Michigan

Kelli Smith, CFRE joined Saint Mary's Foundation in 2011 shortly after arriving in Grand Rapids. In her role as Senior Special Gifts Officer, Kelli is responsible for leading the development and implementation of major and planned giving strategies to increase overall philanthropic support to Mercy Health Saint Mary's. Kelli serves as the Foundation's liaison for several fund development committees, providing support and direction to key volunteer stakeholders and clinical allies.

Kelli's professional and community affiliations include: • Catholic Charities of West Michigan, Board of Directors, Vice President – 2013-present (President beginning October 2017) • Western Michigan Planned Giving Group, Board President – 2016-2017; Ex-officio 2/2017 and Nominating Committee Chairperson • Trinity Health Systems Philanthropy Planned Giving Committee – 2015-current • East Grand Rapids Schools Foundation, Major Gifts Committee Co-chair – 2017-current • Greater Grand Rapids Chapter of Jack & Jill of America, Inc. 2011-2014, 2016-present • Crew Board, Corresponding Secretary, East Grand Rapids High School Rowing Team – 2015-16 • Lake Michigan Academy, Fund Development Committee 2014-2016 • Leadership Grand Rapids, Class of 2015 • Kentwood Community Church, Board of Elders 2013-2015 • Association of Fundraising Professionals (AFP) Member • Association of Health Care Philanthropy (AHP) Member.

Prior to joining Mercy Health Saint Mary's, Kelli served as a Senior Major Gifts Officer at Beaumont Hospital's Foundation, after spending more than a decade in academic advancement.

Kelli is a graduate of University of Detroit Mercy with a Master of Science in Health Services Administration.

Russell James III, Ph.D., J.D., CFP
Professor
The CH Foundation Chair of Personal Financial Planning
Texas Tech University
Lubbock, Texas

After more than a quarter century spent as a planned giving fundraiser, an estate planning attorney in private practice, a major gifts fundraiser/college president, and now as a university professor researching charitable giving and fundraising, Dr. James' focus is to make and share words, pictures, and discoveries that help others to encourage generosity.

A world-renowned expert in the fields of charitable giving, charitable estate planning, Behavioral- and Neuro-economics, his research has been cited in outlets such as The Economist, The Wall Street Journal, The New York Times, U.S. News & World Reports, CNN, NBC News, Bloomberg News, ABC News, USA Today, and The Chronicle of Philanthropy. The research methodologies he utilizes include econometric analysis of large datasets, functional magnetic resonance imaging (neuroimaging), skin conductance response, and online and in-person experiments.

Dr. James' teaching includes classroom and online graduate instruction, webinars, seminars, educational videos, and keynote presentations at national conferences for fundraisers, financial planners, and estate planners.

His publications have appeared in more than forty different academic journals including Cognitive Neuroscience, Environment & Behavior, Applied Economics, Applied Economics Letters, American Journal of Economics & Sociology, Social Indicators Research, American Review of Public Administration, Nonprofit and Voluntary Sector Quarterly, Nonprofit Management and Leadership, International Journal of Nonprofit & Voluntary Sector Management, Voluntas-International Journal of Voluntary & Nonprofit Organizations, Journal of Financial Counseling & Planning, Financial Services Review, Journal of Personal Finance, Journal for Financial Planning, Journal of Financial Therapy, Estate Planning & Community Property Law Journal, Ageing & Society, Educational Gerontology, International Journal of Consumer Studies, Journal of Consumer Affairs, Review of Religious Research, and The Geneva Papers on Risk & Insurance.

Anne Kelley Russell
Trusts and Estates Attorney
Womble Bond Dickinson

A native of Little Rock, Arkansas, Anne Kelley operates out of our Charleston office and offers clients throughout South Carolina a wide range of estate planning and wealth transfer advice. Primarily, she provides counsel to business owners, individuals and families who want to ensure that their wishes are followed in the event of a serious illness or death.

With her Master of Tax Law, Anne Kelley works with business owners, individuals and families to preserve, protect and transfer wealth to the next generation in the most tax efficient manner.

Anne Kelley has significant experience advising fiduciaries of estates and trusts on the probate and distribution of assets, the preparation and filing of fiduciary income and estate tax returns, and general estate and trust administration. Anne Kelley also represents beneficiaries and fiduciaries in will contests, spousal elective share petitions, breach of fiduciary duty claims, and trust modifications.

Anne Kelley is a Certified Specialist in Estate Planning and Probate Law in South Carolina.

Anthony J. Ghoston
Retired President and COO, Dividend Assets Capital
Coastal Community Foundation Board of Directors

Anthony J. Ghoston is a retired financial services professional with over 30 years of experience in executive leadership roles working with small to mid-size asset management firms, investment advisory firms and mutual fund administration organizations. During his career he has held several key roles as Chief Executive Officer, President and Chief Operating Officer. He has been involved and led strategic business initiatives in the Asset Management, Investment Advisors, Mutual Fund Operations, areas during his career. He has served on Mutual Fund Boards, Advisor Boards, Nonprofit Boards, Executive Committees, Management Committees and Investment Committees.

His experience includes leading key initiatives such as Advisor Merger & Acquisitions, Employee Stock Ownership Purchases, Equity and Ownership Succession Strategies, P&L Responsibility, Advisor and Mutual Fund Operations Restructuring, Asset Management Positioning and Structuring and he's led Strategic Business Planning , Marketing, Advisor Client Experience and Relationship Management.

While retired, he still finds time to provide consulting servicing to advisors and asset managers while serving on the board of Coastal Community Foundation and on their Investment Committee. He attended Indiana University, Purdue University and

Marian College for undergraduate studies and obtained an MBA Certificate from Tulane University along with Executive Leadership training at The Ohio State University.

Tony now spends more time doing volunteer work at his local church food pantry and serving the homeless. He lives in Bluffton SC with his lovely wife April Ghoston and enjoys fishing as his favorite pastime.

Phyllis Silverstein
Senior Vice President | Senior Regional Fiduciary Manager
Philanthropic Services
Wells Fargo

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.
