THE ABUNDANT LIFE

ELEVATE EDUCATE COLLABORATE

2023
GIFT PLANNING COUNCIL CONFERENCE

November 9–10, 2023

I am come that they might have life, and that they might have it more abundantly.

—JOHN 10:10

Dear Gift Planning Council members and guests,

We warmly welcome you to the 2023 Philanthropies Gift Planning Council Conference (GPCC). We hope that you will find the next two days to be edifying and inspiring, both professionally and personally.

Our continuing objective during this conference is to help you recognize charitable-planning opportunities for your clients, educate you regarding various charitable-planning techniques and tools, and provide you information about the charitable priorities of The Church of Jesus Christ of Latter-day Saints.

This year's theme is "The Abundant Life." In John 10:10 the Savior says, "I am come that they might have life, and that they might have it more abundantly." We chose this theme because we want to emphasize the principles of an abundant life and the eternal perspective that accompanies it.

In the October 2022 general conference, President Nelson stated, "In coming days, we will see the *greatest* manifestations of the Savior's power that the world has *ever* seen. Between now and the time He returns 'with power and great glory,' He will bestow countless privileges, blessings, and miracles upon the faithful."

Commenting on those words from President Nelson, Elder Kevin W. Pearson said in a BYU devotional, "May each of us choose to be among those faithful. There has never been a better time to live on earth. These are the fullness of times, the absolute best of times. You have unlimited opportunity to become whatever you want to be. But please remember and never forget that. . . . If you will seek 'first the kingdom of God, and his righteousness,' an abundant life will follow. An abundant life requires an attitude of gratitude and a life of service to others."

Philanthropy helps individuals and families look outside themselves and learn that the very essence of Christlike discipleship is loving and serving others. Over the next two days, our speakers will explore the depths of "The Abundant Life."

Keynote speakers for this year's presentations and activities include:

- Elder D. Todd Christofferson, Member of the Quorum of the Twelve Apostles
- President Brian K. Ashton, President of BYU–Pathway Worldwide
- President C. Shane Reese, President of Brigham Young University
- Tanise Chung-Hoon, Managing Director of the Philanthropies Department
- Judge Thomas B. Griffith, retired judge of the US Court of Appeals for the DC Circuit and current Wheatley Institute Fellow

Many other stellar speakers, including GPC colleagues, will also present. We extend our sincere gratitude for all who have contributed their talents and efforts to make this conference possible. This includes our presenters, the GPC leadership and conference planning committee, the staff at Temple Square, and Gift Planning Services at Philanthropies.

We look forward to this conference and hope you will enjoy your time here with like-minded colleagues and friends. We pray that the Spirit of the Lord may direct each of us now and in the future as we strive to be faithful followers of Jesus Christ.

Warm wishes,

Stan Leavitt, GPC Chair

VENUE

The Church Office Building is home to administrative support staff of The Church of Jesus Christ of Latter-day Saints. Completed in 1972, the building was designed by George Cannon Young. Since the 1970s, the Church Office Building has primarily been used by employees involved in running the operations of the Church, including communications, welfare and humanitarian work, family history, missionary efforts, and production of Church-related materials such as print, video, and online content. The building includes the main tower with 28 floors and east and west wings of 4 floors each.

In April 2019, President Russell M. Nelson announced plans for the renovation of the Salt Lake Temple. The surrounding area on Temple Square and the plaza near the Church Office Building have also been undergoing renovation and restoration. Current updates are available at churchofjesuschrist.org/newsroom.

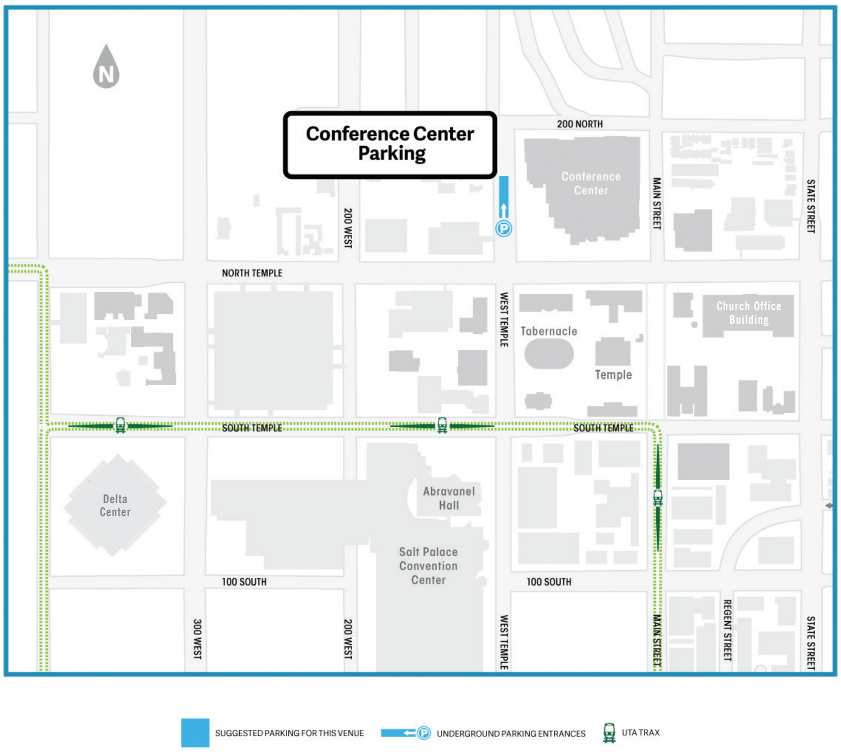
"This project will enhance, refresh, and beautify the temple and its surrounding grounds," said President Nelson when he announced the project. "Obsolete systems within the building will be replaced. Safety and seismic concerns will be addressed. Accessibility will be enhanced so that members with limited mobility can be better accommodated."

PARKING

Free parking for all GPCC attendees is available at the underground Conference Center parking facility. Please note the following:

- The entrance is on West Temple Street by the Conference Center. Enter the parking garage in the center of the street as you drive northbound on West Temple. At the entrance to the garage, tell the attendant you are with the Gift Planning Council Conference happening at the Church Office Building.
- Parking lots fill quickly, so parking is not guaranteed.
- If the Conference Center parking is full or is not available, a parking attendant will be at the street-level entrance to direct you to the next best available lot.

Note: We cannot provide validation for any of the parking facilities at City Creek Center. Should you choose to park at City Creek, you will be responsible for your own parking fees.



Several of the sessions during the conference may qualify for continuing education (CE) credit. Each session is 60 minutes. Due to the variety of presentations, the large number of professional associations to which our GPC members belong, and the geographic diversity of attendees, all attendees are ultimately responsible for submitting attendance and course information to their respective certifying organizations.

We are working toward preapproving the sessions listed below for CE credit in the state of Utah with the Utah State Bar and the Utah Association of Certified Public Accountants, as well as with the National CFP Board. As of the time of this printing, we are awaiting preapproval from these organizations.

Please be aware that not all sessions will qualify for CE credit. The sessions listed below may qualify.

- **"Donor Advised Funds as Planned Giving Tools: Insights from the Latest Research on DAFs"**
  H. Daniel Heist, Assistant Professor, Romney Institute of Public Service and Ethics, BYU Marriott School of Business, and Rebecca Heath Richards, MPA Candidate, Romney Institute of Public Service and Ethics
- **"The GPCC and the Abundant Life: Current and Former Chairs of the Gift Planning Council Discuss Changes and Trends in Planned Giving"**
  Stan Leavitt, CFP, CRPC FuturePoint Wealth Advisors–Ameriprise Financial Services LLC; Paul Comstock, Director and Relationship Manager, Paul Comstock Partners; Todd Hallock, Shareholder, Hallock & Hallock; and Carol Warnick, Partner, Holland & Hart
- **"Tax Planning in a Changing Landscape: Latest Updates and Strategies"**
  Jason Petersen, Tax Account Leader and Global Client Service Partner, EY
- **"Charitable Conversations with Clients"**
  Marianne Ludlow, Attorney, Jones Waldo; Robert L. Packard, CPA, Packard, Appleby & Rogers PC; and Gerilyn Merrill, Wealth Advisor, Everspire
- **"Ethics: 'I Can Do This, but Should I?'"**
  David M. Grant, Estate Planning Attorney, Grant Morris Dodds; Diana George, Director, Family Wealth Consulting, Key Private Bank; and Stephen P. Radmall, CPA, Savage Esplin & Radmall PC
- **"Retirement Accounts and Charitable Planning"**
  Douglas B. Bohne, Attorney, BETTR Law Group, and Kevin Holt, Associate, BETTR Law Group
- **"Multigenerational Philanthropy: A Donor's Perspective"**
  Sarah Dunn, Philanthropist, Wilford Woodruff Papers Board, and Elizabeth Mower, Philanthropist, Sorenson Legacy Foundation Board
- **"Three Life-Changing Decisions"**
  Judge Thomas B. Griffith, retired Judge on the US Court of Appeals for the DC Circuit and current Wheatley Institute Fellow

Complete CE materials—including attendance certificates, presenter biographies, outlines, and presentations—will be available online two weeks after the conference. All attendees will receive an email with a direct link to download these materials.

At the conclusion of the conference, please complete the Continuing Education Attendance Verification Form, found at the end of this booklet, and return it to any Philanthropies staff member. These forms will be kept and used for attendance-verification purposes should your certifying organization call to confirm your attendance.

If you have additional questions regarding CE credit, please call Gift Planning Services at Philanthropies at 877-650-5377 (toll-free) or send an email to giftplanning@ChurchofJesusChrist.org.

RESOURCES AVAILABLE TO YOU

REGISTER A WILL OR TRUST ON OUR WEBSITE

Beneficiary language and tax-identification numbers

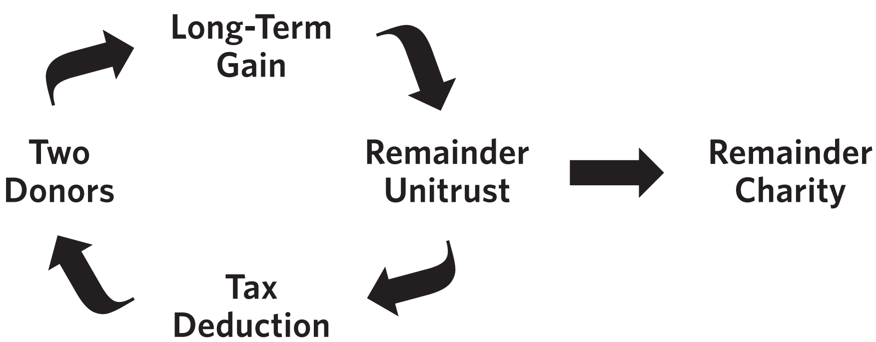
WHITEBOARD VIDEOS

- What is gift planning?
- DAFs
- Family philanthropy
- Wills and trusts
- IRA QCDs
- CGAs
- CRTs
- Beneficiary designations
- Legacy societies
- GPC
- Stocks and securities

Easily shared to teach your clients about different gift planning vehicles.

CALCULATIONS

The Gift Planning Services team can prepare calculations for professionals and clients.



LEGACY SOCIETIES

Why, what, and how behind deferred and outright giving options

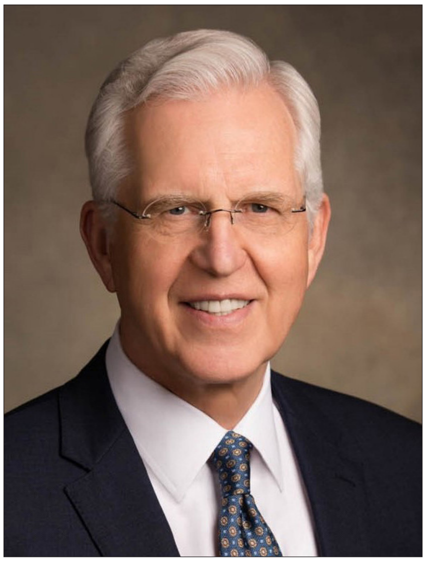
OTHER GPC RESOURCES: Conference archives, newsletters, on-demand webinars, and new member registration

THURSDAY, NOVEMBER 9, 2023

8:00–8:45 a.m.	**Check-in and Breakfast** *Church Office Building (COB) Auditorium*
8:45–9:00 a.m.	**Welcome** Stan Leavitt, CFP, CRPC FuturePoint Wealth Advisors–Ameriprise Financial Services LLC, Chair of the Gift Planning Council *COB Auditorium*
9:00–9:45 a.m.	**“Enough and to Spare: Zion in Abundance”** Tanise Chung-Hoon, Managing Director, Philanthropies *COB Auditorium*
10:00–11:00 a.m.	**“Charitable Conversations with Clients”** Marianne Ludlow, Attorney, Jones Waldo; Robert L. Packard, CPA, Packard, Appleby & Rogers PC; Gerilyn Merrill, Wealth Advisor, Everspire *COB Auditorium*
11:15 a.m.–12:15 p.m.	**“Retirement Accounts and Charitable Planning”** Douglas B. Bohne, Attorney, BETTR Law Group, and Kevin Holt, Associate, BETTR Law Group *COB Auditorium*
12:30–2:00 p.m.	**Lunch** **“BYU–Pathway Worldwide Update”** President Brian K. Ashton and Matt Eyring, Vice President of Field Operations *26th Floor, COB*
2:15–3:15 p.m.	**“Ethics: ‘I Can Do This, but Should I?’ ”** David M. Grant, Estate Planning Attorney, Grant Morris Dodds; Diana George, Director, Family Wealth Consulting, Key Private Bank; and Stephen P. Radmall, CPA, Savage Esplin & Radmall PC *COB Auditorium*
3:30–4:30 p.m.	**“Tax Planning in a Changing Landscape: Latest Updates and Strategies”** Jason Petersen, Tax Account Leader and Global Client Service Partner, EY *COB Auditorium*
5:30–7:00 p.m.	**Dinner** **“The Salt Lake Temple Renovation Project”** Georges Bonnet, Director of Communications, Salt Lake Temple Reconstruction *26th Floor, COB*
7:30–9:30 p.m.	**Optional Activity** Tabernacle Choir at Temple Square Rehearsal *Tabernacle*

FRIDAY, NOVEMBER 10, 2023

8:00–8:45 a.m.	**Breakfast** *COB Auditorium*
8:45–9:45 a.m.	**"The GPCC and the Abundant Life: Current and Former Chairs of the Gift Planning Council Discuss Changes and Trends in Planned Giving"** Stan Leavitt, CFP, CRPC FuturePoint Wealth Advisors–Ameriprise Financial Services LLC; Paul Comstock, Director and Relationship Manager, Paul Comstock Partners; Todd Hallock, Shareholder, Hallock & Hallock; and Carol Warnick, Partner, Holland & Hart *COB Auditorium*
10:00–11:00 a.m.	**"Three Life-Changing Decisions"** Judge Thomas B. Griffith *COB Auditorium*
11:15 a.m.–Noon	Elder D. Todd Christofferson, Quorum of the Twelve Apostles *COB Auditorium*
12:15–1:45 p.m.	**Lunch** **"Brigham Young University Update"** President C. Shane Reese and Keith Vorkink, Advancement Vice President *26th Floor, COB*
2:00–3:00 p.m.	**"Donor Advised Funds as Planned Giving Tools: Insights from the Latest Research on DAFs"** H. Daniel Heist, Assistant Professor, Romney Institute of Public Service and Ethics, BYU Marriott School of Business, and Rebecca Heath Richards, MPA Candidate, Romney Institute of Public Service and Ethics *COB Auditorium*
3:15–4:15 p.m.	**"Multigenerational Philanthropy: A Donor's Perspective"** Sarah Dunn, Philanthropist, Wilford Woodruff Papers Board, and Elizabeth Mower, Philanthropist, Sorenson Legacy Foundation Board *COB Auditorium*
4:15–4:30 p.m.	**Closing Remarks** Stan Leavitt *COB Auditorium*



D. TODD CHRISTOFFERSON, QUORUM OF THE TWELVE APOSTLES

Elder D. Todd Christofferson was called to the Quorum of the Twelve Apostles in April 2008. At the time of his call, he was serving in the presidency of the Seventy. During his tenure in the presidency of the Seventy, he had supervisory responsibility for the North America West, Northwest, and Southeast areas of the Church. He also served as executive director of the Family and Church History Department. Earlier, he was president of the Mexico South Area of the Church.

Born in American Fork, Utah, Elder Christofferson graduated from high school in New Jersey. He earned his bachelor's degree from Brigham Young University, where he was an Edwin S. Hinckley Scholar. He then received his law degree from Duke University.

Prior to his call to serve as a full-time general authority, Elder Christofferson was associate general counsel of NationsBank Corporation (now Bank of America) in Charlotte, North Carolina. Previously he was senior vice president and general counsel for Commerce Union Bank of Tennessee in Nashville, where he was also active in community affairs and interfaith organizations.

From 1975 to 1980, Elder Christofferson practiced law in Washington, DC, after serving as a law clerk to US district judge John J. Sirica (1972–74). He assisted Judge Sirica in the Watergate trials, the White House tapes proceedings, and related matters during that period. Elder Christofferson served as a US Army Reserve officer on active duty and inactive reserve status from 1971 to 1979.

He has served the Church in a number of positions throughout his life, including as bishop and stake president. From age 19 to 21, he served as a missionary in Argentina.

Elder Christofferson and his wife, Katherine Jacob Christofferson, are the parents of five children.

BRIAN K. ASHTON, PRESIDENT, BYU–PATHWAY WORLDWIDE

Brian K. Ashton was appointed by the Board of Education of The Church of Jesus Christ of Latter-day Saints as the second president of BYU–Pathway Worldwide in 2021. He served as the organization's first vice president of field operations from 2018 until his appointment as president.

President Ashton previously led an EdTech startup. He received a bachelor's degree from Brigham Young University and an MBA from Harvard University.

From 2015 to 2019, he served as second counselor in the Church's Sunday School general presidency. He has also served as president of the Texas Houston South Mission, bishop, high councilor, elders quorum president, and missionary in the Peru Lima Mission. He and his wife, Melinda, are the parents of seven children.

MATT EYRING, VICE PRESIDENT OF FIELD OPERATIONS, BYU–PATHWAY WORLDWIDE

Matt Eyring is the vice president of field operations at BYU–Pathway Worldwide; he previously served as director of international field operations. Earlier, he was the chief strategy and innovation officer of Vivint Smart Home, where he led strategy, product, and technology operations. He was a founding and managing partner of a global strategy and innovation consulting firm, Innosight, and was named one of Fast Company's Most Creative People in Business. Eyring began his career at the consultancy Monitor Company, where he advised senior public and private sector leaders in emerging markets on matters of economic competitiveness and prosperity.

Eyring is a graduate of the Harvard Business School. He has coauthored several *Harvard Business Review* articles, and he holds 35 technology patents. He previously served as an area seventy in the North America Northeast Area. He and his wife, Amy, are the parents of five children.

C. SHANE REESE, PRESIDENT, BRIGHAM YOUNG UNIVERSITY

C. Shane Reese began his tenure as the 14th president of Brigham Young University on May 1, 2023. Prior to his appointment, he served as BYU academic vice president from 2019 to 2023 and dean of the BYU College of Physical and Mathematical Sciences from 2017 to 2019. He also serves as a member of the Department of Statistics faculty and is an elected fellow of the American Statistical Association.

President Reese's research has centered on Bayesian hierarchical models and Bayesian optimal experimental designs. He has created statistical models addressing a range of issues, including predicting the power of solar storms, determining the safest method for destroying chemical weapons, and assessing climate impact on glaciers in high-mountain Asia and Antarctica. His work has been used by the US Olympic volleyball team as well as the NFL's Philadelphia Eagles.

President Reese joined the BYU statistics faculty in 2001. He received BYU's Young Scholar Award in 2004 and the Karl G. Maeser Excellence in Teaching Award in 2010. He was the Melvin W. Carter Professor of Statistics from 2012 to 2017. Prior to entering academia, he worked in the Computer, Computational, and Statistical Sciences Division of Los Alamos National Laboratory.

President Reese earned a doctoral degree in statistics from Texas A&M University and master's and bachelor's degrees in statistics from BYU.

KEITH VORKINK, ADVANCEMENT VICE PRESIDENT, BRIGHAM YOUNG UNIVERSITY

Keith Vorkink was appointed advancement vice president May 18, 2020. In addition to general university administrative duties, Vorkink oversees Athletics, BYU Broadcasting, University Communications, Alumni and External Relations, and Philanthropies.

Prior to serving as advancement vice president, Vorkink was an associate dean in the Marriott School of Business and a visiting professor for the MIT Sloan School of Management. His research focused on behavioral economics and on asset pricing.

Vorkink received an undergraduate degree in economics at BYU in 1994, then earned an MA and a PhD in economics from the University of Rochester in 2000. After working for a year as an assistant professor at Bryant College, he returned to BYU to teach in the Marriott School of Business.

Vorkink has received multiple research awards in the BYU Department of Finance and was honored with the top research award in the Marriott School of Business in 2005. He was awarded BYU's Young Scholar Award in 2007 and received a teaching excellence award from the Marriott School of Business in 2012. His work has appeared in several top finance publications. He is a member of the American Finance Association, the Western Finance Association, and the Econometric Society. A lesser-known fact about Vorkink: he played basketball for Snow College.

DOUGLAS B. BOHNE, ATTORNEY, BETTR LAW GROUP

Douglas B. Bohne is an attorney at BETTR Law Group (formerly Bohne Law Group) who emphasizes business planning, charitable planning, estate planning, estate administration, probate, and taxation. He is a former tax manager for the international accounting firm Coopers & Lybrand in San Francisco. Bohne has taught courses in income tax, estate, and gift tax and business planning for the American College of Bryn Mawr, Pennsylvania; the one-day course on Advanced Tax Planning Using Charitable Techniques sponsored by the California CPA Education Foundation; and Fundamentals of Estate Planning through the California Continuing Education of the Bar. The California State Bar Board of Legal Specialization has designated him a certified specialist in estate planning, trust, and probate law. He has served on the board of trustees of the Children's Hospital Foundation in Oakland, California, and is a past board member of the Contra Costa County Committee of Leave a Legacy. Bohne served as a committee member, vice chair, and chair of the Estate Planning, Trust, and Probate Law Advisory Commission to the California State Bar Board of Legal Specialization and is a past president of the Estate Planning Council of Diablo Valley. He also contributed to a multivolume tax treatise published by Matthew Bender. Bohne received his undergraduate degree in accounting from the University of Utah and his law degree from the University of the Pacific, McGeorge School of Law. He is a member of local and state bar association sections of taxation and estate planning, trust, and probate law.

GEORGES BONNET, DIRECTOR OF COMMUNICATIONS, SALT LAKE TEMPLE RECONSTRUCTION

Georges Bonnet was born in Germany and lived there and in France as a youth. He joined the Church in France at age 16. After serving a full-time mission in the Papeete-Tahiti Mission (French Polynesia) in 1970–1971, he studied at LDS Business College, Brigham Young University, and Arizona State University. He graduated from Arizona State with a bachelor's degree in construction engineering in 1977. Bonnet and his wife, Carolyn, are the parents of six biological children—three daughters and three sons—and an adopted daughter from Ghana, West Africa. Bonnet was responsible for the construction of the Tahiti Temple, was the physical facilities manager for Western and Eastern Europe, and was physical facilities manager in the UK. In Africa, he served three times as director for temporal affairs, established the first area office of the Church in West Africa, and oversaw the construction of the Accra Ghana Temple. Most recently, Bonnet has served for five years in the Office of the Presiding Bishopric. Since August 2019 he has been part of the project management team for the Salt Lake Temple renovation project. Bonnet is currently a sealer in the Jordan River Temple, and he and his wife enjoy serving as primary teachers in their ward.

TANISE CHUNG-HOON, MANAGING DIRECTOR, PHILANTHROPIES

Tanise Chung-Hoon was appointed managing director for the Philanthropies Department of The Church of Jesus Christ of Latter-day Saints in August 2013. Her responsibilities include oversight for fundraising at the Church higher education institutions (BYU, BYU–Hawaii, BYU–Idaho, BYU–Pathway Worldwide, and Ensign College) as well as approved Church programs and priorities. Prior to her assignment as managing director, Chung-Hoon served as the executive director of development for LDS Philanthropies at BYU. More specifically, she has led efforts for fundraising in support of the president's priorities, scholarships, mentored student learning, capital projects, and other approved priorities. Development of strategies and coordinating efforts for interactions with donors at all levels is a significant part of her daily work. Additionally, she had oversight of the President's Leadership Council (PLC), representing the Office of the President while directing the affairs of the university fundraising team. Prior to her time at BYU, Chung-Hoon worked at UVU for seven years. She served for two and a half years as the assistant dean in the College of Humanities, Arts, and Social Sciences and for five years as assistant athletic director for Student Services and assistant women's basketball coach. She earned a bachelor's degree in business finance from BYU, a master's degree in educational administration from the University of Utah, and a PhD in higher education administration with an emphasis in organizational strategy and philanthropy from BYU. Her research interests focus on networking, developing enduring donor engagement, and building and sustaining lifelong relationships. She and her husband, Kaiwi, are the parents of three children, and they have four grandchildren. She enjoys learning, reading, family activities, technology, and sports.

PAUL COMSTOCK, DIRECTOR AND RELATIONSHIP MANAGER, PAUL COMSTOCK PARTNERS

Throughout his 50-plus-year career, Paul Comstock has focused on issues impacting generation-spanning trusts, private family investment companies, charitable and noncharitable split interest trusts, private foundations, and the gift planning efforts of public nonprofits. He organized First Endowment Development Corporation d/b/a Paul Comstock Partners in 1983 as an independent, privately owned, fee-only advisory firm. His daughter Alison Moss now leads the firm, but Comstock continues to serve as a director and remains active in client-service activities. Comstock has held leadership roles with the Planned Giving Council of Houston, the Estate Planning Council of Houston, the National Association of Gift Planners, and the Center of Philanthropy at Indiana University. He also chaired the National Planned Giving Council sponsored by the Philanthropies Department of The Church of Jesus Christ of Latter-day Saints. Because of his multigenerational family wealth management organizational work, Comstock was asked to participate in the peer invitation-only Committee for Family's Flourishing, a group of nationally engaged family wealth advisory specialists. Comstock currently serves on the board of directors of the Erie Canal Heritage Fund and is chair of its development committee. He received a bachelor's degree in business from the Rochester Institute of Technology and a master's degree in financial services from the American College.

SARAH DUNN

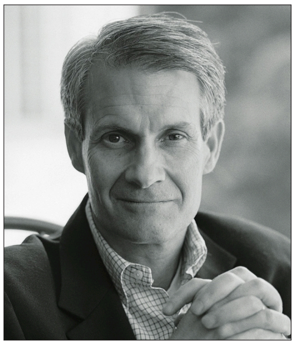
Sarah Dunn has a degree in elementary education from Utah State University. A highlight during her time in school was spending a semester studying abroad at the BYU Jerusalem Center for Near Eastern Studies. After teaching sixth grade for several years, she turned her attention to raising her family full-time. Since then, she has spent many hours serving in the schools and in her community. Dunn has a deep love for family history and loves searching records and family stories. Recently she has become involved with various philanthropic opportunities with her family foundation. She currently serves as a board member for the Wilford Woodruff Papers project. Dunn and her husband, Jason, live in Cottonwood Heights, Utah, and have four children.

DIANA GEORGE, DIRECTOR, FAMILY WEALTH CONSULTING, KEY PRIVATE BANK

Diana George is a director of Key's family wealth consulting team. She is responsible for collaborating with Key Private Bank offices and family wealth teams to provide transition advisory needs and family wealth planning. She works closely with private business owners and their families during the pre-transition, mid-transition, and post-transaction phases. She also works closely with the Key family wealth team to serve the planning and wealth advisory needs of ultra-high-net-worth clients. Prior to joining Key, George served as a private client advisor for Bank of America Private Bank, where she focused on business owners, corporate executives, nonprofit organizations, and women in transition. She earned a bachelor's degree in accounting from the University of Phoenix, an MBA from Colorado State University, and a master's of taxation from Weber State University. She currently serves on the boards of National Association of Corporate Directors Utah and Girls Scouts of Utah and is a committee governance member for the Children's Center.

DAVID M. GRANT, ESTATE PLANNING ATTORNEY, GRANT MORRIS DODDS

David M. Grant is a partner at Grant Morris Dodds. Grant's practice focuses on estate planning, asset protection, and business law, with an emphasis on tax implications for high-net-worth clients. In addition to handling the estate planning needs for some of Southern Nevada and Southern Utah's wealthiest families, he also regularly speaks and writes on the topics of business law, trusts and estates, federal taxation, and asset preservation. He is a member of the faculty at the Dixie L. Leavitt School of Business at Southern Utah University. Grant places a high priority on giving back to his community, and he has served on many association and not-for-profit boards. He speaks fluent Spanish, having lived in Guatemala for two years.



JUDGE THOMAS B. GRIFFITH, RETIRED JUDGE ON THE US COURT OF APPEALS FOR THE DC CIRCUIT AND CURRENT WHEATLEY INSTITUTE FELLOW

Judge Thomas B. Griffith was appointed to the United States Court of Appeals for the DC Circuit in 2005. He stepped down from the bench in 2020 and is currently a lecturer on law at Harvard Law School, a fellow at the Wheatley Institute at Brigham Young University, and special counsel in the Washington, DC, office of the law firm of Hunton Andrews Kurth. Most recently, he served on President Biden's Commission on the Supreme Court and on the American Bar Association's Task Force for American Democracy. Judge Griffith's writings have been published by the *Harvard Law Review*, the *Yale Law Journal*, the *Stanford Lawyer*, the *Wall Street Journal*, the *Washington Post*, and the *Deseret News*. Before being appointed to the DC Circuit, Judge Griffith served as general counsel at BYU, Senate legal counsel, and nonpartisan chief legal officer of the US Senate. He was also a partner at a major law firm in Washington, DC. Long active in rule-of-law programs in former communist nations, he is a member of the international advisory board of the CEELI Institute in Prague. He is also a member of the board of directors of Interfaith America and the American Law Institute.

TODD HALLOCK, SHAREHOLDER, HALLOCK & HALLOCK

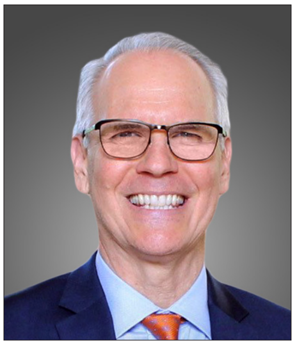
Todd Hallock is a shareholder in the law firm of Hallock & Hallock, a professional corporation located in Logan, Utah. He provides solutions-based guidance to his clients in meeting their estate planning and family business succession planning goals. In addition to being licensed to practice law in Arizona, Idaho, and Utah, he has also been certified as a farm succession coordinator by the International Farm Transition Network. Hallock graduated with a degree in history from Arizona State University and received his law degree from the Brigham Young University J. Reuben Clark Law School, both with honors. Outside of work, he enjoys running, hiking, golfing, and spending time with his family.

H. DANIEL HEIST, ASSISTANT PROFESSOR, ROMNEY INSTITUTE OF PUBLIC SERVICE AND ETHICS

H. Daniel Heist is an assistant professor of public administration and nonprofit management in the Romney Institute of Public Service and Ethics at Brigham Young University. He earned a BA from Pennsylvania State University, a master's degree in philanthropic studies from the Lilly Family School of Philanthropy at Indiana University, and a PhD in social welfare from the University of Pennsylvania. Heist's research focuses on charitable giving, philanthropy, and volunteering, and his nine years of professional fundraising experience inform his research and teaching. He is a leading expert on donor-advised fund research and a cofounder of the Donor-Advised Fund Research Collaborative. Heist and his wife, Katie, have five children.

KEVIN HOLT, ASSOCIATE, BETTR LAW GROUP

After completing a JD/MAcc from the J. Reuben Clark Law School and the Marriott School of Business at Brigham Young University, Holt joined BETTR Law Group in Walnut Creek, California, as an associate in 2016. He focuses on the areas where trusts, estates, and taxes overlap. In addition to drafting tax-intensive estate plans and advising on trust and probate administrations, he prepares estate and gift tax returns and advises clients on California property tax planning strategies. Previous professional presentations include "Mastering Irrevocable Trusts: ILITs, SLATs, CRTs"; "While the Sun Shines: Gifting Before 2026"; and "Property Tax Planning from 13 to 19: Navigating Clients Through a Shifting Landscape." Outside of the office, Holt enjoys road cycling, reading classic literature and philosophy, and building wooden train sets with his three-year-old son.



STAN LEAVITT, CHAIR OF THE GIFT PLANNING COUNCIL, CFP, CRPC FUTUREPOINT WEALTH ADVISORS–AMERIPRISE FINANCIAL SERVICES LLC

Stan Leavitt is a founding partner of FuturePoint Wealth Advisors with Ameriprise Financial. He graduated with a bachelor's degree in marketing from BYU in 1989 and began his career as a commercial real estate broker in San Francisco. He transitioned into the life insurance industry, focusing on financial and estate planning before joining Merrill Lynch 1998. In 2017 he joined Ameriprise Financial and founded FuturePoint Wealth Advisors, where he uses his background in investment real estate, life insurance, and financial and estate planning to help his clients navigate the challenges in their financial lives and achieve their financial goals. Leavitt is driven by a passion for his family, faith, and philanthropy. He was recognized by Forbes as a Best-In-State Wealth Advisor in 2022 and 2023.

MARIANNE LUDLOW, ATTORNEY, JONES WALDO

Marianne Ludlow started in estate and business planning more than 20 years ago, when the estate tax exemption amount was $600,000. She currently focuses her practice on estate and business planning and administration at the law firm of Jones Waldo, and she works primarily out of Jones Waldo's Lehi office. She received her undergraduate degree in economics at BYU and her law degree with high honors from George Mason University, graduating in the top 10 percent of her class for both degrees. Ludlow currently serves on the executive committee of the Utah Bar Estate Planning Section and on the board of the Utah County Estate Planning Council. She is a member of the National Association of Estate Planners. In her spare time, Marianne helped found a K–8 charter school in the heart of Silicon Slopes that promotes entrepreneurial and self-directed learning. She loves to ski, hike, and travel with her family.

GERILYN MERRILL, WEALTH ADVISOR, EVERSPIRE

Gerilyn Merrill graduated with her bachelor's degree from Brigham Young University. She has been involved in the world of investing and financial advisement since 2009 when she helped start Cederian Investments. She then took advantage of additional opportunities provided by Cederian's merger with Everspire in 2016, when she became fully licensed. She enjoys helping her wide circle of friends and family understand investing principles, set meaningful goals, and reach their financial objectives. Merrill has a unique set of experiences that have taken her around the globe: she has been a member of the Primary Children's Hospital Planned Giving Committee and an active BNI participant; she has traveled widely; and, as a mother of eight and grandmother of one, she often engages in a variety of school, church, and community activities. She recently completed an as-yet-unpublished novel.

ELIZABETH MOWER, SORENSON LEGACY FOUNDATION BOARD

Elizabeth Mower was born in Tallahassee, Florida, attended elementary school in Ventura, California, and then moved to Utah. She graduated from BYU, returned to California to serve a Spanish-speaking mission, and currently lives in Holladay, Utah. She is the oldest child of Doug and Carol Smith and the oldest grandchild of James and Beverley Sorenson. She currently serves as an ordinance worker at the Jordan River Utah Temple, as an ESL instructor at the Church Humanitarian Center, and as a board member on Utah first lady Abby Cox's "Show Up" initiative. Mower also represents her family on the Sorenson Legacy Foundation Board. She and her husband, Mike, have seven children and a two-month-old granddaughter.

ROBERT L. PACKARD, FOUNDING PARTNER, PACKARD, APPLEBY & ROGERS PC

Robert L. Packard, CPA, is the founding partner of Packard, Appleby & Rogers PC located in Mesa, Arizona. He earned both a BS in accounting and a MAcc from Brigham Young University in 1976. He has specialized in tax planning and preparation, especially trust, charitable, and estate planning. Packard enjoys serving as a director of several private foundations. He and his wife, the former Chris Schowalter, who also graduated from BYU in 1976, have been married for 47 years and have five children and 12 grandchildren. Packard looks forward to an active retirement and spending time with family and friends at the couple's new vacation home.

JASON PETERSEN, TAX ACCOUNT LEADER AND GLOBAL CLIENT SERVICE PARTNER, EY

Jason Petersen, a seasoned tax account leader at EY, has been serving clients in Northern California, with a primary focus on the dynamic Silicon Valley, for 22 years. Throughout his extensive career, he has cultivated invaluable experience working with a wide range of companies, both large public enterprises and private ventures.

One of Petersen's key areas of expertise lies in supporting start-ups and high-growth companies during their domestic and international expansion journeys, guiding them through the intricate web of tax complexities that come hand in hand with growth. In addition, Petersen holds a leadership role within EY's tax practice, overseeing the delivery of vital services to the State of California and its departments and agencies as well as local governments throughout the state.

Petersen's contributions extend beyond the realm of traditional tax compliance. He has played a pivotal role in successfully navigating companies through critical milestones such as public offerings and acquisitions, ensuring the alignment of economic rights to intellectual property, enabling international expansion, and facilitating favorable resolutions to audits conducted by the IRS and other taxing authorities.

He started his career serving large private companies and their owners and estates and now spends a significant amount of time with public companies and their needs in ASC 740 and tax compliance, and in helping companies that want to co-source or outsource any part of their tax functions. Working closely with EY's other tax service lines, he develops innovative strategies to minimize tax liabilities through proactive planning techniques, embracing accounting methods, transfer pricing, restructuring, and capitalizing on tax incentives and credits.

Petersen loves his family, the Church, and pickleball. Two of his five children are also in the accounting profession. He has a daughter serving in the Montana Billings Mission. Petersen served a mission to Rostov-na-Donu, Russia, and has served in many Church callings. He is currently serving as a seminary teacher.

STEPHEN P. RADMALL, CPA, SAVAGE ESPLIN & RADMALL PC

Stephen P. Radmall is president and shareholder of Savage Esplin & Radmall PC where he consistently parks "fire ready!" His practice focuses on tax planning and compliance for closely held businesses, estate planning, income taxation of trusts and estates, US income taxation of international transactions, multistate taxation, and IRS representation, where he continues to remain on hold. He received his BS degree in accounting from Southern Utah University, where he rolled his way to a B+ in bowling. After graduation, he worked for Deloitte & Touche in Phoenix, Arizona, where he prepared K1 forms for pop sensation Madonna. He currently serves on the board of trustees for the Huntsman World Senior Games where he has experienced a lot of "senior moments." He was recently named to the "diamond level" of his fantasy football league. He is married to Kanab High School legend and grandmother extraordinaire LaRae and together they have four children and eleven grandchildren.

REBECCA HEATH RICHARDS, MPA CANDIDATE, ROMNEY INSTITUTE OF PUBLIC SERVICE AND ETHICS

Rebecca Heath Richards received her bachelor of science degree in human resource management from BYU's Marriott School of Business, where she is currently completing a master's degree in public administration. During her undergraduate studies, she worked closely with the Ballard Center and was recognized as a Ballard Scholar. Prior to her MPA, she was a project management intern for the Welfare and Self-Reliance Department of The Church of Jesus Christ of Latter-day Saints. Her most recent positions include working as a development research assistant and serving as the executive director of Grantwell—an organization that advises philanthropic clients on how best to distribute wealth and fund social interventions. In these roles she has managed large-scale events with a $50,000+ budget, participated in multimillion-dollar fundraising campaigns, managed a half dozen teams of five students each, and even recruited, trained, and onboarded more than 50 volunteers that she then managed for an increase in 60 percent productivity. In her free time, Richards manages her own business as a professional freelance harpist.

CAROL WARNICK, PARTNER, HOLLAND & HART

A partner at Holland & Hart, Carol Warnick concentrates her practice in several related areas. One is estate and wealth transfer planning and administration, in which her clients include executives, owners of closely held businesses, and families of significant wealth. Another focus is serving as a member of the firm's trust and estate litigation group, in which she litigates on behalf of trustees and other fiduciaries (both individual and corporate), heirs, beneficiaries, and creditors in the resolution of probate- or trust-related disputes. Warnick is an AAA-trained mediator and mediates trust- and estate-related disputes. She actively practices in Colorado, Utah, and Wyoming.

PHILANTHROPY. FAMILY STYLE.

After Harold and Kathleen Stuart sold their home for more than they had expected, their financial planner told them, “Money is worth nothing unless you do something with it.” The Stuarts had been giving to multiple causes for years. But this time, they wanted it to mean something more.

The Stuarts established a donor advised fund (DAF) with Deseret Trust Company to create an endowed scholarship fund for students studying special education at Brigham Young University. The fund honors their son James, who passed away in his early twenties.

James was autistic and endured multiple serious health issues, but he also achieved many great things, including serving as a missionary for The Church of Jesus Christ of Latter-day Saints. Numerous special education teachers made a difference for James, and the Stuarts hope that their gift will support future special education teachers who will bless the lives of others like James.

Philanthropies

philanthropies.ChurchofJesusChrist.org/donorfund

Deseret Trust Company

daf.deserettrust.com

GIFT PLANNING SERVICES (GPS) at Philanthropies was organized to confidentially assist you and your clients when a charitable gift is part of their overall estate and financial plan. Your clients may wish to support The Church of Jesus Christ of Latter-day Saints, including its educational institutions and other Church affiliated charities. GPS can help ensure that the philanthropic parts of their estate plan incorporate their personal and family values, accomplish their charitable desires, and align with their other financial objectives.

TRACE M. EDDINGTON, DIRECTOR, DONOR STRATEGY AND RELATIONSHIP DEVELOPMENT

Trace M. Eddington received his bachelor of arts degree in communication from Brigham Young University in 1995 and went on to earn his MA from Gonzaga University in communication and leadership studies. He has been with Philanthropies since 2003, previously holding positions as a senior communications specialist, senior manager of marketing and communications, and executive secretary to the Philanthropies Directors Council. He is a former television sports anchor in eastern Idaho and in his free time serves as the BYU football and men's basketball public address announcer.

DAVID J. BONNER, SENIOR MANAGER, GIFT PLANNING SERVICES

David J. Bonner received his bachelor of science degree from the University of Utah, with majors in political science and sociology. He served an internship with the Hinckley Institute of Politics, then earned his juris doctor degree from Brigham Young University's J. Reuben Clark Law School. Following law school, he served a judicial clerkship and then worked in the land department of Shell Oil Company. Bonner experienced a winter semester with Russian law students when he was invited to serve as a visiting lecturer at Moscow State University. Prior to joining Philanthropies in 2000, he was the endowment director for the Montana Council of the Boy Scouts of America. He is a member of the Utah Bar Association and a former president of the Southern Utah Estate Planning Council. He is also a member and former officer with the Utah Valley Estate Planning Council.

ED KNIGHT, GIFT PLANNING SPECIALIST

Ed Knight began his career in accounting after earning both bachelor's and master's degrees in accountancy from BYU in 2001. After working as an auditor, he attended law school at Arizona State University's Sandra Day O'Connor College of Law, graduating in 2006. Prior to joining Philanthropies, he practiced estate planning in Gilbert, Arizona. He also worked in planned giving and management roles with several nonprofits in the Phoenix area, and he was an active volunteer on many boards and committees. He and his wife, Lisa, have seven children. Their family moved to Provo in 2022 when Ed joined the Philanthropies team.

CARL A. McLELLAND, GIFT PLANNING SPECIALIST

Carl A. McLelland is a member of the Utah Bar Association, the National Association of Charitable Gift Planners, and the Salt Lake Estate Planning Council. He graduated from the University of Utah with a bachelor's degree in political science and earned his juris doctor from J. Reuben Clark Law School at Brigham Young University. He received the certified specialist in planned giving certification from California State University, Long Beach. Prior to joining Philanthropies, he practiced law in Salt Lake City.

JERRY L. REYNOLDS, GIFT PLANNING SPECIALIST, COMPLIANCE

Jerry L. Reynolds earned his baccalaureate degree in accounting from Brigham Young University's Marriott School of Business in 1977. He also earned his juris doctor from BYU's J. Reuben Clark Law School in 1980. Reynolds is a member of the Utah State Bar Association. Prior to joining Philanthropies, he practiced law in Provo, Utah, with an emphasis in real estate law, banking law, commercial law, and wills, trusts, and estates. He has been with Philanthropies since 1999.

DAVID J. SMITH, DONOR LIAISON, GIFT PLANNING

David J. Smith received BA degrees in English, Japanese, and humanities from Brigham Young University and an MS in non-profit administration from Louisiana State University. He joined Gift Planning Services in 2012, where his responsibilities focus on donor engagement, the legacy societies, the Gift Planning Council, and planned gift marketing and outreach. Smith has been with Philanthropies since 2002, holding positions as the director of annual giving, telefund manager, and donor stewardship officer. He is a former member of the BYU Alumni Board of Directors and is a freelance sportswriter covering the Utah Jazz. He is a certified fund raising executive (CFRE) and a member of the National Association of Charitable Gift Planners and the Council for Advancement and Support of Education.

JENNIFER WILSON, GIFT PLANNING SPECIALIST

Jennifer Wilson received her BA in English from Brigham Young University in 1983, and her juris doctor degree from BYU Law School in 1986. She then moved to Orange County, California, where she practiced law for many years as an estate attorney. She is a member of the State Bar of California, the Utah Valley and Salt Lake Estate Planning Councils, the Utah Planned Giving Round Table, and the National Association of Charitable Gift Planners. She is currently enjoying serving as a board member of the Utah Valley Estate Planning Council and the Provo Housing Authority. She is immediate past chair of the Women in Law Committee in the J. Reuben Clark Law Society. Wilson and her husband, Chris, have five children and sixteen grandchildren.

Current fundraising opportunities include:

BRIGHAM YOUNG UNIVERSITY

- **Inspiring Learning Initiative**—to provide students in every academic discipline with outstanding educational opportunities, including field studies, internships, mentored research, scholarships, and study abroad.
- **BYU Athletics**—to build a distinctive, exceptional athletic program that is fully aligned with the mission and values of the university and the Church.
- **BYU Broadcasting**—to be the family entertainment brand that young people want, parents trust, and families enjoy together.

BYU–HAWAII

- **IWORK** (work-study program)—to assist international students and prepare them to become leaders in their families, communities, and stakes of Zion worldwide.
- **General Scholarship Fund**—to assist students.

BYU–IDAHO

- **Need-Based Financial Aid**—to assist students.

BYU–PATHWAY WORLDWIDE

- **Scholarships**—to help returned missionaries and students in financial need.
- **International Tuition Offset**—to cover the margin between actual costs and adjusted tuition rates worldwide.

ENSIGN COLLEGE

- **Student Financial Aid Fund**—to provide support for internships, leadership opportunities, returned missionaries, international and domestic students, and those in need of financial aid.
- **M. Russell Ballard Service and Leadership Scholarship**—to recognize students who have shown service and leadership characteristics.
- **Internships and Learning Experiences**—to provide valuable skills and fulfill requirements for graduation.

CHURCH GENERAL FUND

- **Church General Fund**—to cover activities and programs supported by the Church (for example, Church History, FamilySearch, and The Tabernacle Choir).

MISSIONARY DEPARTMENT

- **General Missionary Fund**—to cover housing, food, and travel expenses for missionaries from disadvantaged areas of the world, including Africa, Central America, and South America.

HUMANITARIAN AID FUND

- **Humanitarian Services**—to relieve suffering, lift burdens, and provide hope through its signature programs, including refugee response, clean-water projects, wheelchair provisions, maternal and newborn care, vision care, immunization campaigns, food production training, and a variety of local community projects.

One hundred percent of donations made through Philanthropies goes to the cause identified by the donor; no overhead or fundraising expenses are covered by donations.

PHILANTHROPIES GIFT PLANNING COUNCIL 15TH BIENNIAL CONFERENCE

NOVEMBER 9–10, 2023

Church Office Building, Salt Lake City, Utah

Continuing Education Attendance Verification

The following sessions may qualify for continuing education credit. You will need to self-report your attendance to your certifying organization. Please acknowledge your attendance by checking the appropriate boxes and providing the requested information. We will maintain a record of your attendance in the event we are contacted by your certifying organization.

Please deliver your completed form to the registration desk before you leave the conference.

- ☐ **I attended all sessions.**
- ☐ **"Donor Advised Funds as Planned Giving Tools: Insights from the Latest Research on DAFs"**
  H. Daniel Heist, Assistant Professor, Romney Institute of Public Service and Ethics, BYU Marriott School of Business, and Rebecca Heath Richards, MPA Candidate, Romney Institute of Public Service and Ethics
- ☐ **"The GPCC and the Abundant Life: Current and Former Chairs of the Gift Planning Council Discuss Changes and Trends in Planned Giving"**
  Stan Leavitt, CFP, CRPC FuturePoint Wealth Advisors–Ameriprise Financial Services LLC; Paul Comstock, Director and Relationship Manager, Paul Comstock Partners; Todd Hallock, Shareholder, Hallock & Hallock; and Carol Warnick, Partner, Holland & Hart
- ☐ **"Tax Planning in a Changing Landscape: Latest Updates and Strategies"**
  Jason Petersen, Tax Account Leader and Global Client Service Partner, EY
- ☐ **"Charitable Conversations with Clients"**
  Marianne Ludlow, Attorney, Jones Waldo; Robert L. Packard, CPA, Packard, Appleby & Rogers PC; and Gerilyn Merrill, Wealth Advisor, Everspire
- ☐ **"Ethics: 'I Can Do This, but Should I?'"**
  David M. Grant, Estate Planning Attorney, Grant Morris Dodds; Diana George, Director, Family Wealth Consulting, Key Private Bank; and Stephen P. Radmall, CPA, Savage Esplin & Radmall PC
- ☐ **"Retirement Accounts and Charitable Planning"**
  Douglas B. Bohne, Attorney, BETTR Law Group, and Kevin Holt, Associate, BETTR Law Group
- ☐ **"Multigenerational Philanthropy: A Donor's Perspective"**
  Sarah Dunn, Philanthropist, Wilford Woodruff Papers Board, and Elizabeth Mower, Philanthropist, Sorenson Legacy Foundation Board
- ☐ **"Three Life-Changing Decisions"**
  Judge Thomas B. Griffith, retired Judge on the US Court of Appeals for the DC Circuit and current Wheatley Institute Fellow

Email address: ______________________________

Full name: ______________________________

Signature: ______________________________

State and State Bar # (if applicable): ______________________________

State and CFP registrant ID number (if applicable): ______________________________

Last four digits of your Social Security number (for CFPs only): ______________________________

State and CPE License Number (if applicable): ______________________________

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I certify that I have attended the following courses, which I believe qualify for the listed amount of hours of continuing education credit:

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Full name: ______________________________

Signature: ______________________________

State: ______________ State membership ID number: ______________

Certifying professional organization: ______________________________

Total continuing education credit hours: ______________

DAVID J. BONNER
Senior Manager, Gift Planning Services, Philanthropies

HELP YOUR CLIENTS LEAVE A LASTING LEGACY

LEGACY SOCIETIES were created to allow generous donors to help deserving students through a planned gift. Planned gifts are vital to helping each CES institution develop disciples of Jesus Christ who are leaders in their homes, the Church, and their communities.

- **Jesse and Amanda Knight Society (Brigham Young University)**
- **Matthew Cowley Society (BYU–Hawaii)**
- **BYU–Idaho Legacy Society**
- **BYU–Pathway Worldwide Legacy Society**
- **F. Y. and Anna Fox Society (Ensign College)**

Each society is open to any donor who has named one of the Church schools in a deferred gift, such as a will, a life insurance policy, a gift annuity, or a trust. No minimum gift amount is required to join. After Philanthropies is notified of the deferred gift, Gift Planning Services includes the donor in the respective society's activities.

Gifts given today will greatly bless others tomorrow.

Visit **give.churchofjesuschrist.org/gift-planning** to learn more.

Gift Planning Services
PHILANTHROPIES