



*An Intersection of Faith and Philanthropy*  
**2021 GIFT PLANNING COUNCIL CONFERENCE**

**November 18–19, 2021**

**Church Office Building • Salt Lake City, Utah**



*That faith also might increase in the earth.* —DOCTRINE AND COVENANTS 1:21

Dear Gift Planning Council (GPC) members and guests,

We warmly welcome you to the Philanthropies Gift Planning Council Conference (GPCC). Our hope is that the next two days will be edifying and will inspire you, both professionally and personally. The objective of the GPCC is to help you recognize charitable-planning opportunities with your clients, to continue to educate you regarding various charitable-planning techniques and tools, and to provide information about the charitable priorities of The Church of Jesus Christ of Latter-day Saints. We hope that as you engage with Philanthropies and Gift Planning Services as well as with the GPC, you will gain fresh insights related to estate and charitable planning that you can use and share with your clients and colleagues.

The theme for our conference this year is “An Intersection of Faith and Philanthropy.” In section 1 of the Doctrine and Covenants, we learn that a part of our labors as followers of Jesus Christ is to help faith increase in the earth (see Doctrine and Covenants 1:21). The word *philanthropy* comes from ancient Greek and means “love of humanity.” We chose this theme because we believe that philanthropy, the love of humanity, can play a central role in increasing faith in the earth. It can bring the giver, the recipient, and the advisor into a common mission that seeks to promote good in the world. If anything is good, it is of God and will increase faith. Despite all that has gone on in the world since we last met, people continue to give. You cannot give without some belief that your gift will be of benefit. You cannot give without faith! Over the next two days, our speakers will explore this intersection of faith and philanthropy.

Keynote speakers for this year’s presentations and activities include

- Elder Quentin L. Cook, Member of the Quorum of the Twelve Apostles
- Bishop Gérald Caussé, Presiding Bishop
- Elder Clark G. Gilbert, General Authority Seventy and Commissioner of the Church Educational System
- President John S.K. Kauwe, President of BYU–Hawaii
- Tanise Chung-Hoon, Managing Director of the Philanthropies Department
- Brigitte Madrian, Dean of the BYU Marriott School of Business

Many other stellar speakers, including some GPC colleagues, will also present. We extend our sincere gratitude for all who have brought their talents and efforts to make this conference possible. This includes our presenters, the GPC leadership and conference planning committee, the staff at the Church Office Building and Joseph Smith Memorial Building, and Gift Planning Services at Philanthropies.

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

Warm wishes,

Todd Hallock, 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 and genealogy, 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 four 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](https://www.ChurchofJesusChrist.org/newsroom).

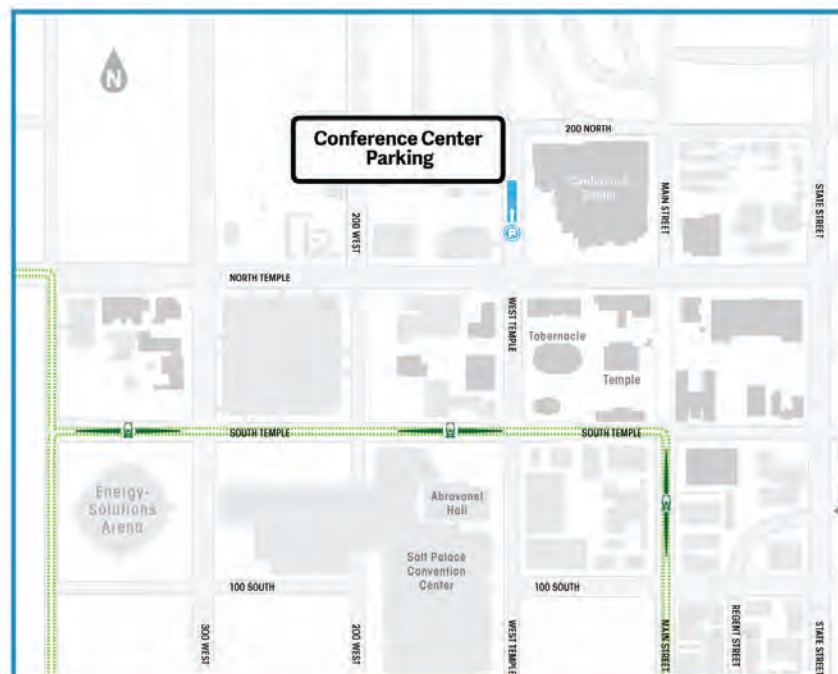
“This project will enhance, refresh, and beautify the temple and its surrounding grounds,” said President Nelson. “Obsolete systems within the building will be replaced. Safety and seismic concerns will be addressed. Accessibility will be enhanced so that members with limited mobility can be better accommodated.”

## 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 in the center of the street by heading northbound on West Temple and tell the attendant you're with the Gift Planning Council Conference happening at the Church Office Building.
- Parking lots do fill quickly, and parking is not guaranteed.
- If the Conference Center parking is full or is not available, a parking attendant will be at the top of the 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 waiting to hear back regarding preapproval with these organizations.

Please be aware that not all sessions will qualify for CE credit. We have applied for seven hours of CE for the Utah Bar and the Utah Association of CPAs, and six hours of CE with the CFP Board. Because of recent requirement changes by the CFP Board, the “Ethical Skills for Career Success” session will not qualify for CFP CE.

- **“Structuring Charitable Giving to Maximize Tax Savings and Impact Particularly with Retirement Assets”**  
By Marianne Ludlow, JD, and Doug Flake, JD, CPA
- **“The Gift of Lift”**  
By David R. York, CPA, Attorney at Law
- **“Ethical Skills for Career Success”**  
By Brigitte Madrian, PhD, Dean and Distinguished Professor, BYU Marriott School of Business, and Aaron Miller, JD, MPA, Professor, BYU Marriott School of Business
- **“Encore: The Law of Witnesses in the Day of Remote Online Notarization”**  
By Kyle B. Gee, Counsel, BakerHostetler
- **“Contrasting Donor-Advised Funds and Private Foundations”**  
By John Barger, President/CEO, Deseret Trust Company, and Steven J. Chidester, Attorney at Law, Partner, Withers Worldwide, Rancho Santa Fe, California
- **“The View from Washington—An Update on Current Legislation”**  
By Wes Coulam, MBA, Managing Director, Washington Council Ernst & Young LLP, and Brent Andrews, Attorney at Law, Chairman of the Board, Kirton McConkie
- **“Gift Planning Services Panel Discussion: There’s No Giving Like Planned Giving”**  
Panel presentation with David Bonner, Jerry Reynolds, Carl McLelland, Shalayne Davis, Jacob Dowse, and David Smith; moderated by Trace Eddington

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](mailto:giftplanning@ChurchofJesusChrist.org).

**THURSDAY, NOVEMBER 18, 2021**

- 8:00–8:45 a.m.      ***Check-In and Breakfast***  
*Church Office Building (COB) Auditorium*
- 8:45–9:00 a.m.      ***Welcome***  
Todd Hallock, Hallock & Hallock, Chair of the Gift Planning Council  
*COB Auditorium*
- 9:00–9:45 a.m.      ***The Intersection of Faith and Philanthropy—One Work***  
Tanise Chung-Hoon, Managing Director,  
Philanthropies Department  
*COB Auditorium*
- 10:00–11:00 a.m.      ***Structuring Charitable Giving to Maximize Tax Savings and Impact  
Particularly with Retirement Assets***  
Marianne Ludlow, JD, and Doug Flake, JD, CPA  
*COB Auditorium*
- 11:15 a.m.–12:15 p.m.      ***The Gift of Lift***  
David R. York  
*COB Auditorium*
- 12:30–1:30 p.m.      ***Networking Lunch***  
*Sharon and Manchester Room, 9th Floor, JSMB*
- 1:45–2:45 p.m.      ***Ethical Skills for Career Success***  
Brigitte Madrian, PhD, Dean and Distinguished Professor, BYU  
Marriott School of Business, and Aaron Miller, JD, MPA, Professor,  
BYU Marriott School of Business  
*COB Auditorium*
- 3:00–4:00 p.m.      ***Encore: The Law of Witnesses in the Day of Remote Online  
Notarization***  
Kyle B. Gee, Counsel, BakerHostetler  
*COB Auditorium*
- 4:15–5:15 p.m.      ***Contrasting Donor-Advised Funds and Private Foundations***  
John Barger, President/CEO, Deseret Trust Company, and  
Steven J. Chidester, Attorney at Law, Partner, Withers  
Worldwide, Rancho Santa Fe, California  
*COB Auditorium*
- 6:00–7:30 p.m.      ***Dinner with Bishop Gérald Caussé***  
*Sharon and Manchester Room, 9th Floor, JSMB*

## FRIDAY, NOVEMBER 19, 2021

- 8:00–8:45 a.m.      ***Breakfast***  
*COB Auditorium*
- 9:00–9:45 a.m.      ***Opening Remarks***  
**Elder Quentin L. Cook**  
*COB Auditorium*
- 10:00–11:00 a.m.      ***The View from Washington—An Update on Current Legislation***  
**Wes Coulam, MBA, Managing Director, Washington Council  
Ernst & Young LLP, and Brent Andrewsen, Attorney at Law,  
Chairman of the Board, Kirton McConkie**  
*COB Auditorium*
- 11:15 a.m.–noon      ***BYU–Hawaii Update***  
**President John S.K. Kauwe**  
*COB Auditorium*
- 12:15–1:45 p.m.      ***Lunch with Elder Clark G. Gilbert, Commissioner of the  
Church Educational System***  
*26th Floor, COB*
- 2:00–2:45 p.m.      ***Rich in Good Works***  
**Mark and Laura Willes**  
*COB Auditorium*
- 3:00–4:00 p.m.      ***Gift Planning Services Panel Discussion: There’s No Giving  
Like Planned Giving***  
**Panel presentation with David Bonner, Jerry Reynolds, Carl  
McLelland, Shalayne Davis, Jacob Dowse, and David Smith;  
moderated by Trace Eddington**  
*COB Auditorium*
- 4:00–4:15 p.m.      ***Closing Remarks***  
**Todd Hallock**  
*COB Auditorium*



**ELDER QUENTIN L. COOK, QUORUM OF THE TWELVE APOSTLES**

Elder Quentin L. Cook was sustained as a member of the Quorum of the Twelve Apostles of The Church of Jesus Christ of Latter-day Saints on October 6, 2007. Called as a general authority in April 1996, he served in the Second Quorum, the First Quorum, and the Presidency of the Seventy.

He previously served in the Area Presidency in the Philippines, as president of the Pacific Islands and the North America Northwest Areas, and as executive director of the Missionary Department.

Prior to his call to be a general authority of the Church, he had been a managing partner of a law firm and president and CEO of a California health care system. He also served on the governing boards of a number of civic and business-related corporations.

He is a native of Logan, Utah, and received a bachelor’s degree in political science from Utah State University, with honors, and a doctor of jurisprudence from Stanford University. Utah State University awarded him an honorary doctor of laws degree.

Prior to his call as a general authority, he also served the Church as a full-time missionary in the British Mission and as a bishop, stake president in the San Francisco California Stake, regional representative, and area authority in the North America West Area.

He married Mary Gaddie on November 30, 1962. They are the parents of three children and have 11 grandchildren.



**BISHOP GÉRALD CAUSSÉ, PRESIDING BISHOP**

Bishop Gérald Caussé was serving as a general authority seventy and as a counselor in the Europe Area Presidency when he accepted the call to be a counselor in the Presiding Bishopric at the April 2012 general conference. In October 2015, he became the 15th presiding bishop in the Church’s history.

He is the third presiding bishop born outside the United States and the first for whom English is a second language.

Bishop Caussé received a master’s degree in business from ESSEC in 1987. His career has been in the food industry, where he has worked with several supermarket chains and food distribution companies. At the time of his call as a general authority seventy, he was the general manager of Pomona, a food distribution company in France.

His Church service includes elders quorum president, bishop’s counselor, stake president’s counselor, stake president, and area seventy.

Gérald Caussé was born in Bordeaux, France, on May 20, 1963. He married Valérie Lucienne Babin in August 1986. They are the parents of five children.



**ELDER CLARK G. GILBERT, GENERAL AUTHORITY SEVENTY AND CHURCH COMMISSIONER OF EDUCATION**

Elder Clark G. Gilbert was sustained as a general authority seventy of The Church of Jesus Christ of Latter-day Saints on April 3, 2021, at age 50. At the time of his call, he had been serving as a member of the Twelfth Quorum of the Seventy in the Utah Area. He is currently serving as the commissioner of the Church Educational System.

Elder Gilbert received a bachelor of arts degree in international relations from Brigham Young University in 1994. In 1995, he received a master of arts degree in Asian studies from Stanford University. In 2001, he received a doctor of business administration degree from Harvard University. He worked as an assistant professor at Harvard University from 2001 to 2006. He then served as associate academic vice president of Brigham Young University–Idaho until 2009, at which time he began working as chief executive officer for *Deseret News* and Deseret Digital Media. In 2015, he became president of Brigham Young University–Idaho. He also served as president of BYU–Pathway Worldwide.

Elder Gilbert has served in a number of Church callings, including as a full-time missionary in the Japan Kobe Mission, elders quorum president, ward Sunday School teacher, counselor in a stake Young Men presidency, counselor in a stake presidency, and bishop.

He and his wife, Christine Calder, are the parents of eight children.



**JOHN S.K. "KEONI" KAUWE III, PRESIDENT, BYU-HAWAII**

John S.K. "Keoni" Kauwe III is the 11th president of Brigham Young University–Hawaii. He assumed the presidency in July 2020. He is a professor of biology at Brigham Young University (BYU) in Provo, where he served previously as chair of the Biology Department and as dean of graduate studies.

President Kauwe earned a bachelor's degree in molecular biology in 1999 and a master's degree in population genetics in 2003 at BYU. From 1999 to 2001, he served as a full-time missionary in the Japan Fukuoka Mission. He received a PhD in evolution, ecology, and population biology in 2007 from Washington University in St. Louis, where he also completed a postdoctoral fellowship in Alzheimer's disease genetics at the Washington University School of Medicine in 2008.

President Kauwe's professional focus has been primarily on solving the genetic basis of risk for Alzheimer's disease. His work, which includes more than 100 peer-reviewed published papers in the past decade, has contributed in unique ways to our understanding of Alzheimer's disease risk and resilience. He also conducts research on the genetic basis of other human traits and is engaged in ongoing work on genomics and population genetics in Indo-Pacific fish species.

President Kauwe is of Hawaiian, Chinese, Portuguese, Maori, and Northern European ancestry. He was raised in Orem, Utah, and various parts of Hawaii and is a graduate of Molokai High and Intermediate School (1996). He is the fourth-great-grandson of Kaleohano, one of the first converts to The Church of Jesus Christ of Latter-day Saints in Hawaii. He and his wife, Monica, are the parents of five children, ages 3 to 14.



**BRENT ANDREWSEN, CHAIRMAN OF THE BOARD, KIRTON MCCONKIE**

Brent Andrewsen is a member of Kirton McConkie's tax and estate planning and a member of the corporate section. He currently serves on the firm's board of directors as chairman of the board. His practice includes estate planning, probate and trust administration, gift taxation, tax-exempt organizations, charitable trusts, and planned giving. Mr. Andrewsen has also advised clients with respect to business matters and has assisted in forming various business entities and transactions. He is a frequent speaker on issues regarding tax-exempt organizations, planned giving, estate planning, and related topics. In

addition to his professional work, he has sat on the boards of various charitable organizations over the years.

Mr. Andrewsen has an AV Preeminent peer rating from Martindale-Hubbell and is recognized as one of Utah's Legal Elite for estate planning and as a Mountain States Super Lawyer for estate planning and nonprofits. He has also been recognized by Best Lawyers in America as a top attorney for trusts or estates and nonprofits or charities, and he was honored by *Utah Business* magazine as a 40 Under 40 Rising Star.

**JOHN M. BARGER, PRESIDENT/CEO AND CHAIRMAN,  
DESERET TRUST COMPANY**

John M. Barger joined Deseret Trust Company as president and CEO and as chairman of the board of trustees in 2013. He previously worked for brokerage and bank-affiliated trust companies and investment management firms in Montana and Utah, serving as senior trust administrator, senior trust officer, and senior vice president. A native of Atlanta, Georgia, John served in the US Air Force for 22 years. His military career involved assignments in signals intelligence and space and missile operations in Turkey,

Italy, Greece, Alaska, and multiple locations in the continental United States. A convert to The Church of Jesus Christ of Latter-day Saints, John served as bishop and stake president in Great Falls, Montana. He and his wife, Lauri, presided in the Kenya Nairobi Mission from 2004 to 2007. John and Lauri have 4 children and 10 grandchildren, and they live in Layton, Utah.



**STEVEN J. CHIDESTER, PARTNER, WITHERS BERGMAN LLP**

Steven J. Chidester is a partner in the private client and tax team. He focuses his practice on estate planning, trust and estate administration, charitable giving, and representing tax-exempt organizations. He has designed and used computer modeling to show the economic consequences of various estate planning and charitable-giving techniques. He is also experienced in the area of executive compensation, focusing on compensation and intermediate sanctions issues for tax-exempt organizations. Steve has represented exempt organizations in IRS audits, in civil and probate court, and before state attorneys general.

He was recognized as one of San Diego's top lawyers of 2020 in charities and nonprofit by *San Diego Magazine*. He was also recognized as a key lawyer by the Legal 500 US in 2021 in the area of nonprofit tax. Steve has been recognized by Super Lawyers for eight years and by Best Lawyers in America since 2011 for nonprofit charities law and for trusts and estates. He has also achieved a Martindale-Hubbell AV rating and received a First Distinguished Service Award in Partnership for Philanthropic Planning of Greater Los Angeles at the Annual Western Regional Planning Giving Conference in 2012.



**TANISE CHUNG-HOON, MANAGING DIRECTOR, PHILANTHROPIES**

Tanise Chung-Hoon was appointed as 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, Tanise served as the executive director of development for LDS Philanthropies at BYU. Her responsibilities included oversight for all development functions and fundraising activities related to the university, including oversight of the President's Leadership Council (PLC) and representing the Office of the President while directing the affairs of the university fundraising team.

Prior to coming to BYU, Tanise worked for seven years at Utah Valley University. She served for two and a half years as the assistant dean in the College of Humanities, Arts, and Social Sciences, for five years as assistant athletic director for Student Services, and as assistant women's basketball coach.

Tanise received her bachelor's degree in business finance from BYU, her master of educational administration degree from the University of Utah, and her 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.



**WES COULAM, MANAGING DIRECTOR, WASHINGTON COUNCIL  
ERNST & YOUNG**

Weston Coulam is managing director of Washington Council Ernst & Young, where he represents clients before Congress and the administration and provides services related to a broad range of policy areas, including financial services, corporate taxation, employee benefits, pass-through taxation, and energy tax issues. Wes works with individual clients and runs advocacy coalitions, including past work assisting the R&D Credit Coalition to successfully enact a permanent R&D tax credit.

Prior to joining Ernst & Young, Wes was executive director at Morgan Stanley, a global financial services firm. He represented Morgan Stanley before Congress and the executive branch on various financial services, corporate tax, and real estate and energy policy issues.

Wes has extensive experience working in Congress and has been involved in most of the major tax and budget legislation that Congress has considered since 1993. His career includes congressional service as a legislative assistant and tax policy advisor to Senator Orrin Hatch (R-UT), former chairman of the Senate Finance Committee. As an aide to Senator Hatch, Wes had responsibility for tax, banking, and employee benefit issues.

In addition, Wes served as staff director of the Senate Committee on Small Business and Entrepreneurship, chaired by Senator Olympia J. Snowe (R-ME). Wes joined Senator Snowe's staff as senior tax policy advisor, assisting her in her role as a senior member of the Senate Finance Committee, and was later appointed staff director of the Small Business and Entrepreneurship Committee, where he led the committee's work providing oversight of federal programs serving small businesses and authorizing the Small Business Administration and its business development and lending programs. In addition to his duties as staff director, Wes continued as principal adviser to Senator Snowe on a range of policy issues, including budget, taxation, and other economic issues.

Wes has also worked at the professional service firms Deloitte & Touche and Arthur Andersen, where he advised corporate clients on corporate tax, energy, and benefits policy issues.

Wes received a BS from the University of Maryland University College and an MBA from the George Washington University in Washington, DC.



**DOUG FLAKE, PARTNER, SQUIRE & COMPANY PC**

Doug Flake joined Squire & Company PC in 1992 and specializes in corporate, partnership, trust and individual, estate, gift, and other types of tax returns. He enjoys working with clients in estate and tax planning, business ownership succession planning, and resolving complex taxation issues.

Doug received his bachelor of science degree from Brigham Young University, magna cum laude, and was named the Karl G. Maeser Scholar in 1990. He graduated magna cum laude from BYU Law School with a juris doctor degree in 1995. He is also a certified public accountant, a member of the Order of the Coif, and a member of the Utah State Bar.



**KYLE GEE, COUNSEL, BAKERHOSTETLER LLP**

Kyle Gee is counsel in BakerHostetler's nationwide private wealth planning team. Formerly a law partner in a distinguished trusts and estates group, Kyle has years of experience counseling multi-generational families, business owners, fiduciaries, entities, family offices, and beneficiaries. His representation extends to high-net-worth and ultra-high-net-worth relationships. He is licensed in Ohio, Pennsylvania, and New Jersey.

In private practice, Kyle draws upon his experiences as a law clerk to a probate court judge to help his clients avoid and resolve trusts and estates disputes. He also understands the challenges and preferences of emerging generations, including their reliance on developing technology. He is highly regarded for his insights on the potential opportunities and hazards of evolving topics in his industry, and he currently serves on a special legislative task force to respond to and propose legislation involving the execution of estate planning documents. Kyle is a frequent lecturer, and his research and commentary have been cited across the globe. He is also an American College of Trust and Estate Counsel (ACTEC) Fellow.



**TODD HALLOCK, HALLOCK & HALLOCK,  
CHAIR OF THE GIFT PLANNING COUNCIL**

Todd Hallock is a shareholder in the law firm of Hallock & Hallock, a professional corporation located in Logan, Utah. Todd 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. Todd 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. Away from work, Todd enjoys spending time with his family, running, hiking, and golfing.



**MARIANNE LUDLOW, ATTORNEY, JONES WALDO**

Marianne Ludlow started in estate and business planning over 20 years ago (when the estate tax exemption amount was \$600,000) and currently focuses her practice on estate and business planning and administration at the law firm of Jones Waldo. 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. She currently serves on the executive committee of the Utah Bar Estate Planning Section and on

the board of the Utah County Estate Planning Council, and 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-led learning. She loves to ski, hike, and travel with her family.





**BRIGITTE C. MADRIAN, DEAN, BYU MARRIOTT SCHOOL OF BUSINESS**

Brigitte C. Madrian is the dean and Marriott Distinguished Professor in the Brigham Young University Marriott School of Business. She is also a research associate at the National Bureau of Economic Research and past director of the NBER Household Finance working group.

Dr. Madrian's current research focuses on behavioral economics and household finance, with a particular focus on household saving and investment behavior. Her work in this area has impacted the design of employer-sponsored savings plans in the US and has influenced pension reform legislation both in the US and abroad. She is a three-time recipient of the TIAA Paul A. Samuelson Award for Scholarly Research on Lifelong Financial Security.



**AARON MILLER, ASSOCIATE PROFESSOR, BYU MARRIOTT SCHOOL OF BUSINESS**

Aaron Miller (JD, MPA, Brigham Young University) is an associate teaching professor in BYU's George W. Romney Institute of Public Service and Ethics in the BYU Marriott School of Business, where he teaches business ethics, nonprofit management, and social entrepreneurship. In addition to teaching, Aaron is the associate managing director of the BYU Ballard Center for Social Impact. He is the recipient of multiple university teaching awards.

Prior to teaching at BYU, Aaron practiced law in areas including small business, nonprofit, taxation, and corporate governance. He is a cofounder of Merit Leadership and coauthor of *The Business Ethics Field Guide*.



**MARK AND LAURA WILLES, BUSINESS EXECUTIVE, AUTHOR, PHILANTHROPISTS**

Mark and Laura Willes both grew up in Salt Lake City. Laura holds a bachelor of arts degree from the University of Minnesota and is the author of four books and many family biographies. She has served as stake Relief Society president and early-morning seminary teacher. Mark received his bachelor of arts and PhD degrees from Columbia University in New York. He worked as a professor of finance at the Wharton School of the University of Pennsylvania, president of the Federal Reserve Bank of Minneapolis, president of General Mills (Minneapolis), chairman and CEO of Times Mirror (Los Angeles), and president of Deseret Management Company (Salt Lake City). He served as president of the Minneapolis Minnesota Stake for nine years. Mark and Laura served together when he presided over the Hawaii Honolulu Mission (2001–2004), when he was branch president at the Provo MTC (2012–2016), and when they were MLS missionaries in the Utah Salt Lake City South Mission (2018–2020). They have 5 children, 20 grandchildren, and 7 great-grandchildren.



**DAVID R. YORK, ATTORNEY, CPA, MANAGING PARTNER,  
YORK HOWELL & GUYMON**

David R. York is an attorney, certified public accountant, and managing partner with the Salt Lake City law firm of York Howell & Guymon (YHG). David practices law in the areas of estate planning, tax, business planning, and nonprofit entities. He is a fellow with the American College of Trust and Estate Counsel (ACTEC) and is the dean of legacy with the Purposeful Planning Institute. David has extensive experience in designing and implementing advanced wealth planning strategies for ultra-high-net-worth clients.

He has spoken to hundreds of public groups and professional organizations, including the TedXSaltLakeCity, Q Commons, the Million Dollar Roundtable, the AALU National Conference, the Hawaii Tax Institute, the Purposeful Planning Institute, the Investments and Wealth Institute, Valmark Member Summit, and the Southeastern Family Office Forum.

He is the coauthor of two books, *Entrusted: Building a Legacy That Lasts* and *Riveted: 44 Values That Change the World*, which after its release was the number one business ethics book on Amazon. He also created the game Experience Rivets, which helps individuals, families, and businesses identify their unique and shared core values to assist them with holistic wealth transfer, effective estate planning, and team building. He has also written for *Trusts & Estates Magazine*, *Estate Planning Magazine*, and *Investments and Wealth Monitor*.

In 2017, YHG was recognized as an Inc. 5000 Company. David currently serves on the boards of directors of Holding Out HELP and Healing Nations. He lives in the Salt Lake City, Utah, area with his wife, Mindy, and their five children, Emma, John, Samuel, Hudson, and Avery. He enjoys biking, skiing, softball, writing, and photography.



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

Trace 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. Trace has been with Philanthropies since 2003, holding positions as a senior communications specialist, senior manager of marketing and communications, and executive secretary to the Philanthropies Directors Council prior to his current role. 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 received his bachelor of science degree from the University of Utah, with majors in political science and sociology. He also served an internship with the Hinckley Institute of Politics. David earned his juris doctor degree from Brigham Young University. Following law school, he served a judicial clerkship and then worked in the land department of Shell Oil Company. David experienced a winter semester with Russian law students when he was invited to serve as a visiting lecturer at Moscow State University. Prior to coming to Philanthropies in 2000, David 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. David is also a member and former officer with the Utah Valley Estate Planning Council.



**DAVID SMITH, DONOR LIAISON, GIFT PLANNING SERVICES**

David received bachelor of arts degrees in English, Japanese, and humanities from Brigham Young University and is currently pursuing a master of science in nonprofit administration. 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. David 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 is a member of the National Association of Charitable Gift Planners and the Council for Advancement and Support of Education.



**CARL A. MCLELLAND, GIFT PLANNING SPECIALIST**

Carl 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 of arts degree in political science and earned his juris doctor from 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.



**JACOB W. DOWSE, GIFT PLANNING SPECIALIST**

Jacob is a member of the Utah State Bar Association and Utah Valley and Salt Lake Estate Planning Councils. Jacob graduated from Brigham Young University with a bachelor of arts degree in history and received his juris doctor from the University of Nebraska. Following law school, Jacob practiced at the law firm of Robinson, Seiler & Anderson LC, where he represented businesses and individuals in a wide range of litigation matters, including real property, contracts, business and commercial, banking, and construction law. Prior to joining Philanthropies in 2019, Jacob worked with the Real Estate Division of The Church of Jesus Christ of Latter-day Saints, where he managed Church real estate assets and worked closely with donors, donor liaisons, and gift planning specialists in overseeing real property donations to the Church. Jacob resides in Utah County with his wife and four children.



**JERRY L. REYNOLDS, GIFT PLANNING SPECIALIST, COMPLIANCE**

Jerry earned his bachelor's degree in accounting from Brigham Young University in 1977. He also earned his juris doctor from Brigham Young University's law school in 1980. He is a member of the Utah State Bar Association. Prior to joining Philanthropies, Jerry 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.



**SHALAYNE DAVIS, GIFT PLANNING SPECIALIST**

Shalayne received a degree in business management from Brigham Young University. She went on to earn her juris doctor from the University of Richmond and then practiced law in Virginia before joining Philanthropies in 2017. She is a member of the Virginia State Bar Association and has experience as the office manager for a small business, managing all aspects of the office, from accounting to human resources and strategic planning.



# PHILANTHROPIES GIFT PLANNING COUNCIL 14TH BIENNIAL CONFERENCE

NOVEMBER 18-19, 2021

*Church Office Building, Salt Lake City, Utah*

## *Continuing Education Attendance Verification*

The following sessions may qualify for continuing education credit. You may 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.**
- “Structuring Charitable Giving to Maximize Tax Savings and Impact Particularly with Retirement Assets”** by Marianne Ludlow, JD, and Doug Flake, JD, CPA
- “The Gift of Lift”** by David R. York, CPA, Attorney at Law
- “Ethical Skills for Career Success”** by Brigitte Madrian, PhD, Dean and Distinguished Professor, BYU Marriott School of Business, and Aaron Miller, JD, MPA, Professor, BYU Marriott School of Business
- “Encore: The Law of Witnesses in the Day of Remote Online Notarization”**  
by Kyle B. Gee, Attorney at Law
- “Contrasting Donor-Advised Funds and Private Foundations”** by John Barger, President/CEO, Deseret Trust Company, and Steven J. Chidester, Attorney at Law, Partner, Withers Worldwide, Rancho Santa Fe, California
- “The View from Washington—An Update on Current Legislation”** by Wes Coulam, MBA, Managing Director, Washington Council Ernst & Young LLP, and Brent Andrews, Attorney at Law, Chairman of the Board, Kirton McConkie
- “Gift Planning Services Panel Discussion: There’s No Giving Like Planned Giving”**  
panel presentation with David Bonner, Jerry Reynolds, Carl McLelland, Shalayne Davis, Jacob Dowse, and David Smith; moderated by Trace Eddington

Email address: \_\_\_\_\_

Full name: \_\_\_\_\_

Signature: \_\_\_\_\_

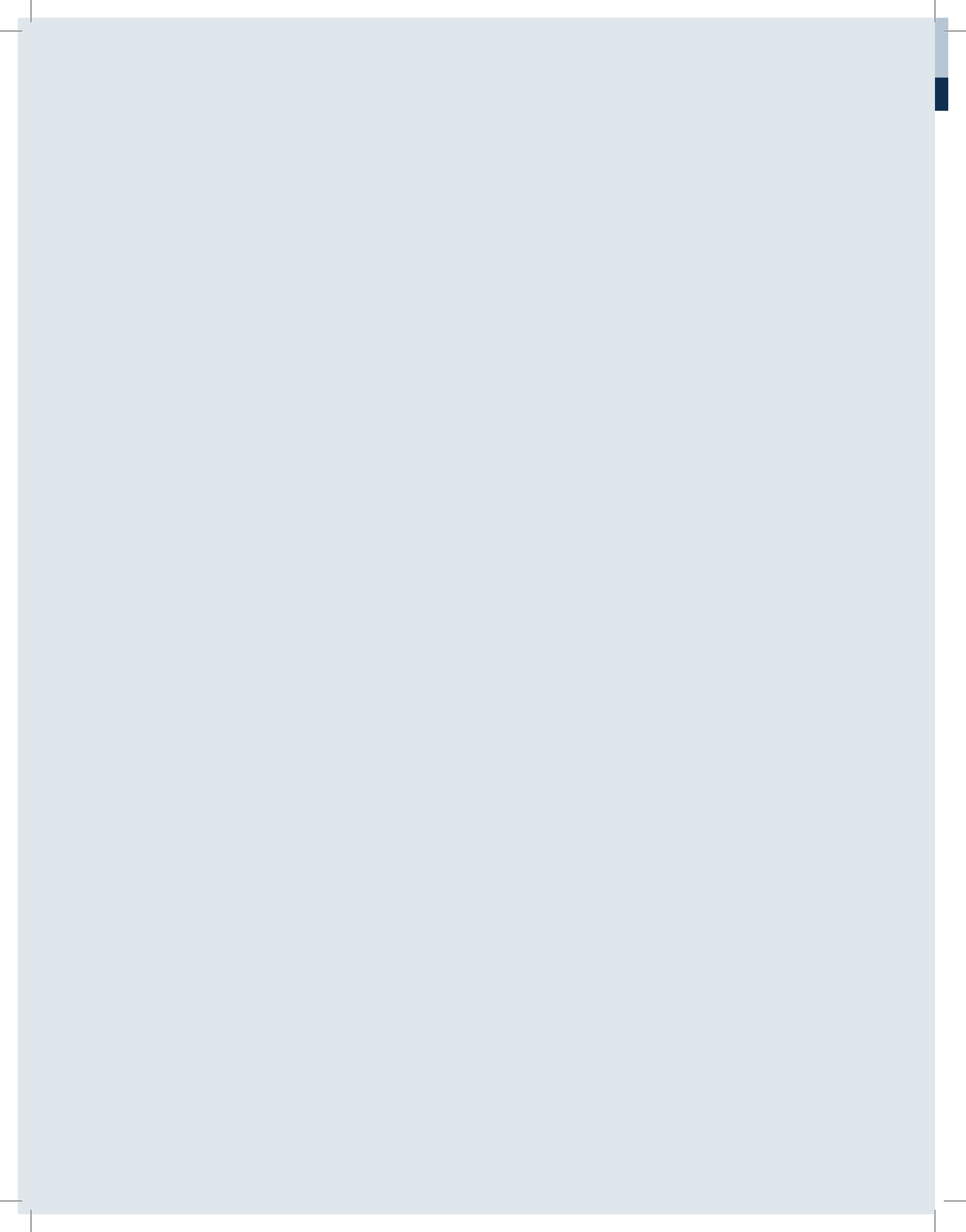
State and State Bar # (if applicable): \_\_\_\_\_

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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NOVEMBER 18-19, 2021

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The following sessions may qualify for continuing education credit. You may need to self-report your attendance with your certifying organization. Please acknowledge your attendance by checking the appropriate boxes and providing the requested information.

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

- I attended all sessions.**
- “Structuring Charitable Giving to Maximize Tax Savings and Impact Particularly with Retirement Assets”** by Marianne Ludlow, JD, and Doug Flake, JD, CPA
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Full name: \_\_\_\_\_

Signature: \_\_\_\_\_

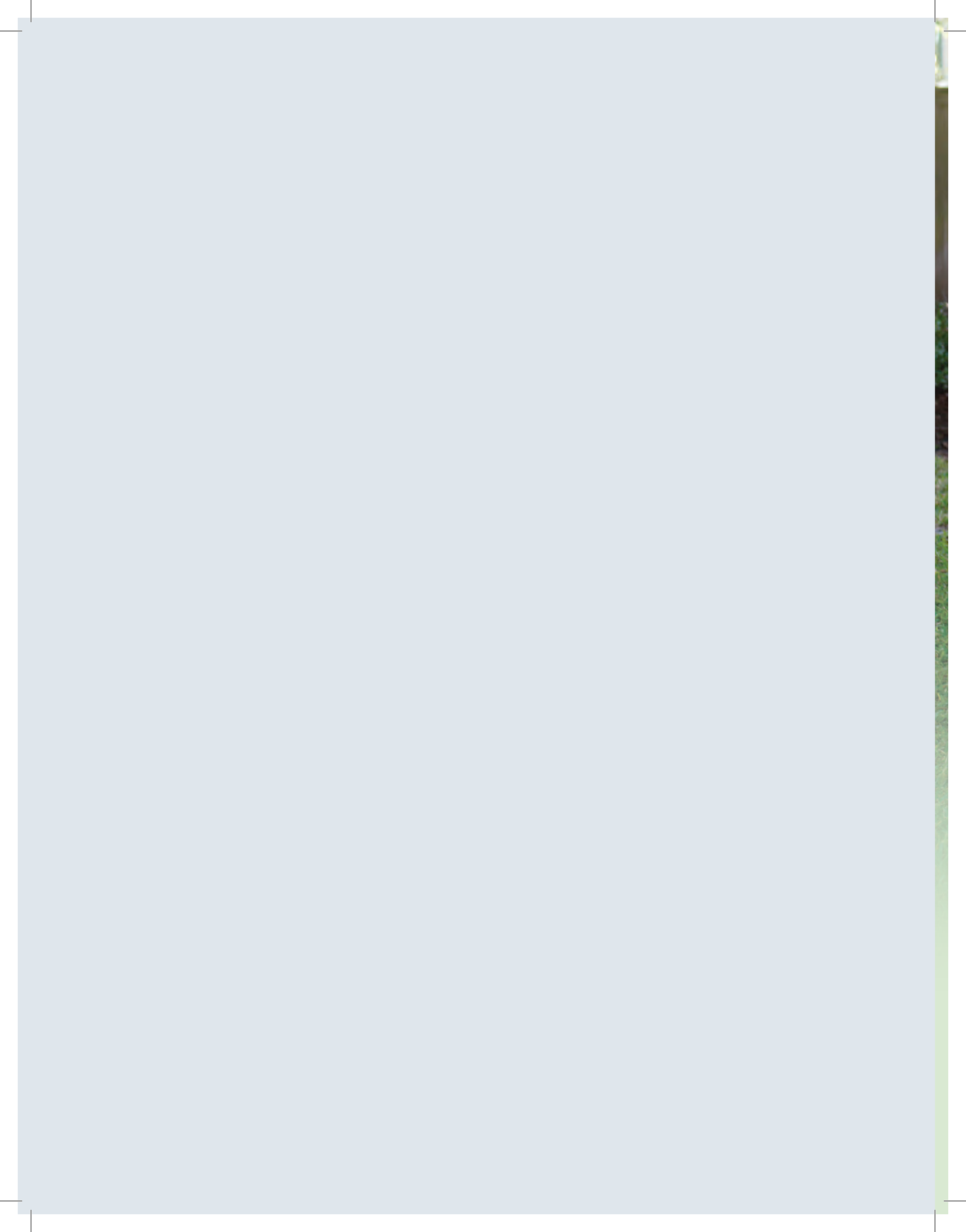
State: \_\_\_\_\_ State membership ID number: \_\_\_\_\_

Certifying professional organization: \_\_\_\_\_

Total continuing education credit hours: \_\_\_\_\_

DAVID BONNER  
*Senior Manager, Gift Planning Services, Philanthropies*









# Building a Legacy of Philanthropy

After serving as welfare missionaries in Hong Kong, Nathan and Jan Meehan felt a need to pass on the value of charitable giving to their extended family. This desire led them to establish two donor-advised funds (DAFs) with Deseret Trust Company.

Through these DAFs, the Meehans have been able to receive immediate charitable-giving tax deductions on money invested while meeting later as a family to decide which charities to support.

"It's been a wonderful experience seeing my grandsons think carefully about charitable organizations they want to support as our family makes meaningful gifts each year," says Nathan.

If you would like information on how to use a Deseret Trust donor-advised fund to facilitate your charitable giving, contact Philanthropies Gift Planning Services at 1-877-650-5377 or [giftplanning@ChurchofJesusChrist.org](mailto:giftplanning@ChurchofJesusChrist.org).

## Philanthropies

▪ [philanthropies.ChurchofJesusChrist.org/donorfund](http://philanthropies.ChurchofJesusChrist.org/donorfund)

## Deseret Trust Company

▪ [daf.deseretrust.com](http://daf.deseretrust.com)





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JESUS CHRIST  
OF LATTER-DAY SAINTS

Gift Planning Services  
PHILANTHROPIES

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