“For Such a Time as This”

2019 GIFT PLANNING COUNCIL CONFERENCE

November 14–15, 2019
Church Office Building
Salt Lake City, Utah

give.lds.org/gpcc
Dear Gift Planning Council (GPC) members and guests,

We warmly welcome you to the Philanthropies Gift Planning Council Conference (GPCC). Whether this is your first time attending or you are a faithful participant, we are so thrilled to be with you this week! Our hope is that this will be another memorable, inspiring, and helpful gathering for each of you, both professionally and personally.

The theme for our conference is “For Such a Time as This” (Esther 4:14). We chose this theme because of all the tumult going on in the world today. It is an appropriate time to emphasize the importance of planning focused on families. This includes the benefit to individual family members of including philanthropy in a financial or estate plan. Engaging in philanthropy changes people. Sadly, we live in a “me-centered” society. Engaging in philanthropy assists those to whom the money is given, but it is also an antidote for entitlement and self-centeredness. In the Old Testament, Esther was placed in her position in order to benefit the Jews. Perhaps we are placed in our positions of working with families in order to assist them in their quest to become better.

Our continuing GPCC objective 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 the GPC, you will gain fresh insights related to estate and charitable planning that you can use and share, maximizing your and your clients’ desires and goals.

Keynote speakers for this year’s presentations and activities include

- Bishop Dean M. Davies, first counselor in the Presiding Bishopric
- Elder Paul V. Johnson, general authority seventy and commissioner of the Church Educational System
- Gail Miller, owner and chair of the Larry H. Miller Group of Companies
- Kim Wilson, chair of the Ensign Peak Foundation
- Tanise Chung-Hoon, managing director of the Philanthropies Department
- Gary Crittenden, managing director of the Missionary Department

Many other stellar speakers, including some GPC colleagues, will also present. We hope it will be a great blend of speeches that will educate, edify, and uplift us all.

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 pray you will enjoy your time here with like-minded colleagues and friends. We pray that the Spirit of the Lord will help direct us now and in the future as we strive to serve His children and help engage every capable person who wishes to help accelerate the building of the kingdom of God.

Warm wishes,

Carol Warnick, GPC Chair
VENUE
The Church Office Building is a 28-story building in the heart of Salt Lake City that houses administrative staff for The Church of Jesus Christ of Latter-day Saints. Completed in 1972, the building was designed by George Cannon Young. An observation deck, which provides a striking view of Antelope Island and the Great Salt Lake to the northwest, the Wasatch Mountains to the east, and Temple Square to the west, is on the 26th floor and is open to the public.

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.
- Parking lots do fill quickly, and parking is not guaranteed.
- The Conference Center parking facility is open from 4:30 a.m. to 10:30 p.m.
- Accessible parking spaces are located throughout the parking facility.
- 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.
- As you exit the Conference Center parking facility, let the attendant know that you are there for the Gift Planning Council Conference.

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. The sessions listed below may qualify.

- “Charitable Planning: A Donor’s Perspective”
  Presented by Gail Miller and Kim Wilson

- “Widows and Their Mites: Planning for Non-Affluent Families”
  Presented by Scott Farnsworth

- “Church Global Treasury—The Heartbeat of the Business”
  Presented by Doug Martin

- “The Electronic Wills Movement: Haman’s Plot or Meant ‘For Such a Time as This?’”
  Presented by Kyle Gee

- “Adapt, Change, or Disappear”
  Presented by David York

- “What Do You Know About Planned Giving? Would You Like to Know More?”
  Panel presentation with David Bonner, Jerry Reynolds, Carl McLelland, Shalayne Davis, Jacob Dowse, and David Smith, moderated by Wes Mashburn

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.
SCHEDULE OF EVENTS

THURSDAY, NOVEMBER 14, 2019

8:00–8:45 a.m.  Check-In and Breakfast
COB East Lobby

8:45–9:00 a.m.  Welcome
Carol Warnick, Holland and Hart, GPC National Chair
COB Auditorium

9:00–10:00 a.m.  Charitable Planning: A Donor’s Perspective
Gail Miller, Owner and Chairman, Larry H. Miller Group
of Companies
Kim Wilson, Chairman, Ensign Peak Foundation
COB Auditorium

10:15–11:15 a.m.  Widows and Their Mites: Planning for Non-Affluent Families
Scott Farnworth, Founder and President of Sunbridge Inc.
and Founder of Will & Trust Express
COB Auditorium

11:30 a.m.–1:00 p.m.  Lunch and Keynote Address: Inspiring Learning to Serve the World
Elder Paul V. Johnson, General Authority Seventy and
Commissioner of the Church Educational System
Sharon & Manchester Room, 9th Floor, JSMB

1:15–2:00 p.m.  Hearts Broken, Brimming with Grace
Kate Holbrook, Managing Historian, Church History Department
COB Auditorium

2:15–3:00 p.m.  Finding a Willing Heart
Gary Crittenden, Managing Director, Missionary Department
COB Auditorium

3:15–4:15 p.m.  Church Global Treasury—The Heartbeat of the Business
Douglas H. Martin, Treasurer, The Church of Jesus Christ
of Latter-day Saints
COB Auditorium

6:00–7:30 p.m.  Dinner with Bishop Dean Davies
Bishop Dean M. Davies, First Counselor in the Presiding Bishopric
Sharon & Manchester Room, 9th Floor, JSMB
SCHEDULE OF EVENTS

FRIDAY, NOVEMBER 15, 2019

8:00–8:45 a.m.  Breakfast  
COB East Lobby

8:45–9:30 a.m.  “For Such a Time as This” . . . One in Charity  
Tanise Chung-Hoon, Managing Director, Philanthropies Department  
COB Auditorium

9:45–10:45 a.m.  The Electronic Wills Movement: Haman's Plot or Meant “For Such a Time as This”?  
Kyle Gee, Counsel (Cleveland, OH), BakerHostetler  
COB Auditorium

11:00 a.m.–12:00 p.m.  Adapt, Change, or Disappear  
David York, Cofounder and Managing Partner,  
York Howell & Guymon  
COB Auditorium

12:15–1:45 p.m.  Networking Lunch  
Sharon & Manchester Room, 9th Floor, JSMB

2:00–2:45 p.m.  The Magic in Planning “For Such a Time as This”  
Kathy Loveless, President and Founder, Loveless Enterprises  
COB Auditorium

3:00–4:00 p.m.  What Do You Know About Gift Planning? Would You Like to Know More?  
Panel Discussion, Gift Planning Services Team  
COB Auditorium

4:00–4:15 p.m.  Closing Remarks  
Carol Warnick, Holland and Hart, GPC National Chair  
COB Auditorium
ELDER PAUL V. JOHNSON

Elder Paul V. Johnson was sustained as a general authority seventy of The Church of Jesus Christ of Latter-day Saints in April 2005. At the time of his call, he had been serving as a member of the Fifth Quorum of the Seventy in the Utah North and Utah Salt Lake City Areas. He has served as commissioner of the Church Educational System, first counselor in the Chile Area Presidency, administrator of religious education and elementary and secondary education, and president of the Europe Area. He is once again serving at Church headquarters as commissioner of the Church Educational System.

Elder Johnson received a bachelor’s degree from Brigham Young University in zoology in 1978 and a master’s degree in counseling and guidance in 1982. He went on to receive a doctorate in instructional technology from Utah State University in 1989.

Elder Johnson has served in a number of Church callings, including full-time missionary in the Norway Oslo Mission, counselor in a stake presidency, high councilor, bishop, elders quorum president, and Young Men president.

Elder Paul Vere Johnson was born in Gainesville, Florida. He and his wife, Jill Washburn, are the parents of nine children.

BISHOP DEAN M. DAVIES

One of eight children (and a twin to a sister), Bishop Davies expresses deep gratitude for a father and mother who not only loved and nurtured their children but also helped them appreciate the blessings and values of work. Weeding the garden, mowing the lawn, washing the stairs, and picking fruit helped put future work and life challenges into a better perspective. “As a young teenager, having the best-cut lawn in our neighborhood brought joy to me, and I learned an important lesson: that a little extra effort can make a real difference in almost everything we do.”

Bishop Dean M. Davies was named the first counselor in the Presiding Bishopric of The Church of Jesus Christ of Latter-day Saints in October 2015. Prior to this assignment, he served as second counselor to Bishop Gary E. Stevenson since March 2012.

Bishop Davies has been employed by the Church since July 1995 and has filled various assignments. Most recently he was managing director of the Special Projects Department, with responsibility for special-purpose real estate, temple design, and temple construction.

Previous to Church employment, Bishop Davies was employed by High Industries Inc. of Lancaster, Pennsylvania, and by Bechtel Investments Inc. of San Francisco, California, where he specialized in the identification, acquisition, development, and management of investment properties. He earned a bachelor’s degree in agricultural economics at Brigham Young University and has completed advanced executive programs at Stanford and Northwestern Universities.

Bishop Davies has served the Church as a mission president, mission president’s counselor, stake president, stake president’s counselor, stake executive secretary, high councilor, member of several bishoprics, and full-time missionary in the Uruguay/Paraguay Mission.

Dean Myron Davies was born in Salt Lake City, Utah. He and his wife, Darla James, have five children and 17 grandchildren.
GAIL MILLER

Gail Miller is the owner of the Larry H. Miller Group of Companies and chairman of the board of directors of Larry H. Miller Management Corporation.

The Larry H. Miller Group began with the purchase of a single Toyota dealership in 1979 and is now made up of more than 80 businesses, including over 60 automotive dealerships, the Utah Jazz, the Salt Lake City Stars, the Salt Lake Bees, theater complexes, and a variety of insurance, financial, and real estate companies. The privately owned Larry H. Miller Group of Companies is headquartered in Sandy, Utah, and employs more than 10,000 people.

The Miller family has created a strong legacy of enriching lives and giving back to the communities in which they do business. Gail presides over the Larry H. Miller Education Foundation and the Larry H. and Gail Miller Family Foundation, which support a wide range of charitable, educational, and humanitarian causes.

Gail is the chairman of Intermountain Healthcare’s Board of Trustees and serves on the Zions Bank Advisory Board. She also serves on the National Advisory Council at the University of Utah and the President’s Leadership Council at Brigham Young University, and she cochairs the Kem C. Gardner Policy Institute Advisory Board. Gail is a member of the Shelter the Homeless Board, and the Gail Miller Resource Center for homeless men and women bears her name. She is the author of *Courage to Be You: Inspiring Lessons from an Unexpected Journey*.

In 2012, Gail married Kim Wilson. Gail and Kim enjoy traveling, serving others, and spending time with their large family. They make their home in Salt Lake City, Utah.

KIM WILSON

Kim Wilson is an emeritus attorney with Snow, Christensen & Martineau, one of Utah’s traditional law firms organized in 1886. Kim retired from the firm in 2019 after 46 years. He currently spends his time in a variety of community and civic endeavors.

He is cofounder and chairman of the board of the Ensign Peak Foundation, formerly known as the Mormon Historic Sites Foundation. He is also a member of the Utah Symphony/Utah Opera’s Board of Trustees, the Salt Lake Community College Board of Trustees, the Clark Planetarium Advisory Board, the Days of ’47 Cowboy Games & Rodeo Executive Committee, and a number of other boards.

Kim grew up on a dairy farm in southern Idaho, where he learned to work and love the land. He earned both his bachelor’s degree in political science and his juris doctor degree from the University of Utah. He was a captain in the U.S. Army Reserve Judge Advocate General Corps. He married Vicky (Schoppe) Wilson in 1971, and together they raised four children and have seven grandchildren. Vicky passed away on their 39th wedding anniversary in 2010. In 2012, Kim married Gail Miller. They make their home in Salt Lake City, Utah, and love spending time with their large family and serving others.

Kim has a passion for history. He enjoys traveling, preserving historic sites, reading history and biographies, trying to stay current on world affairs and scientific advances, attending to his traditional farm and farmhouse in Cache Valley, and beekeeping.
TANISE CHUNG-HOON
Tanise 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 LDS Business College) as well as approved Church programs and priorities (e.g., the General Missionary, Self-Reliance Services/Perpetual Education, Humanitarian Aid [LDS Charities], Church History, Family History, and the Temple Construction and Temple Patron Funds).

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. 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 has 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 coming to BYU, Tanise worked for seven years at UVU. 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 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.

DAVID J. BONNER
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 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 State Bar and a former president of the Southern Utah Estate Planning Council. David is also a member and former officer of the Utah Valley Estate Planning Council. David currently serves as the senior manager of Gift Planning Services at Philanthropies.
SHALAYNE DAVIS
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 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. Shalayne is a gift planning specialist at Philanthropies.

GARY CRITTENDEN
Since 2017, Gary Crittenden has served as the managing director of the Missionary Department of The Church of Jesus Christ of Latter-day Saints, where he oversees all the operational activities of the Church’s nearly 70,000 missionaries worldwide.

Prior to volunteering at the Church, Gary was a managing director, chairman, and chief executive officer of HGGC, a Palo Alto–based middle-market private equity firm. He remains an executive director of HGGC, is on the investment committee of HGGC Funds I and II, and serves as chairman of the board of two HGGC portfolio companies: iQor and Pearl Holding Group. Prior to sale, he also served as chairman of the board of Citadel and Power Holdings. Outside of HGGC, he serves on the boards of Pluralsight, Primerica, and Zions Bancorporation and has previously served on the boards of Staples, Ryerson Tull, and the TJX Companies.

Gary was also the chief financial officer of Citigroup from 2007 to 2009, where he was responsible for the financial management of the firm during the financial crisis. He was also CFO of the American Express Company from 2000 to 2007. Prior to American Express, he was the CFO of Monsanto, Sears Roebuck and Company, Melville Corporation, and Filene’s Basement. On three separate occasions, the readers of Institutional Investor named Gary one of the best CFOs in America.

Gary spent the first 12 years of his career at Bain & Company, an international management consulting firm, where he became a partner. He began his work at Bain in Boston and then cofounded the Munich, Germany, office, where he worked for five years. He eventually headed the firm’s retail practice area.

He graduated with a bachelor’s degree from Brigham Young University in 1976 and with an MBA from Harvard Business School in 1979. He also received an honorary doctorate in recognition of his service in business and the community from Weber State University. Gary and his wife, Cathy, are the parents of three children and 11 grandchildren and reside in Salt Lake City, Utah.

SHALAYNE DAVIS
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 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. Shalayne is a gift planning specialist at Philanthropies.
JACOB W. DOWSE
Jacob is a member of the Utah State Bar and Salt Lake Estate Planning Council. Jacob graduated from Brigham Young University with a BA 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. Jacob is a gift planning specialist at Philanthropies.

SCOTT FARNSWORTH
Scott Farnsworth’s purpose in life is to connect families and change lives. He is an attorney who teaches financial, legal, and philanthropic professionals how to leverage the power of stories, the power of relationships, and the power of unique processes in their work with clients and donors.

He is the president and founder of SunBridge Inc. and the founder of Will & Trust Express, a boutique law firm that delivers professional, convenient, and affordable estate planning services for middle-income families and individuals.

He is the author of four books: Closing the Gap: A Revolutionary Approach to Client and Donor Services, Like a Library Burning: Sharing and Saving a Lifetime of Stories, Puzzling Questions for Middle Income Families, and Double Your Sales: An Honest and Authentic Approach to Professional Selling.

Scott is a well-known national speaker and has been named an innovator of the year by Financial Advisor. He twice served as chairman of the International Association of Advisors in Philanthropy Annual Conference. He is a certified Time to Think facilitator, coach, and consultant.

Scott is a native of Fruitland, New Mexico. He earned his undergraduate degree magna cum laude in Portuguese and political science and his law degree magna cum laude at Brigham Young University. During law school he published two scholarly articles as the managing editor of the BYU Law Review, and, following graduation, he was appointed judicial clerk to the Honorable Paul H. Roney, judge of the United States Court of Appeals for the Fifth Circuit.

In addition to his four decades of professional experience as an estate-planning attorney, he was vice president and trust officer at Trustmark National Bank and a professor of business law at the University of Southern Mississippi. He and his wife, Marcie, live in Harmony, Florida, and they have six children and eight grandchildren.
SPEAKER BIOS

KYLE B. GEE
Kyle is licensed to practice law in Ohio, Pennsylvania, and New Jersey. He joined BakerHostetler in 2018 as counsel in its nationwide Private Wealth group, representing generations of clients in sophisticated, long-term planning for their families, their businesses, and their philanthropic causes.

Mr. Gee began his career as law clerk to a Pennsylvania probate court judge. He later became partner at a midsized Cleveland law firm concentrating in the areas of estate planning and wealth transfer, estate and trust administration, fiduciary representation and litigation, charitable planning, business succession, family foundations, and taxation.

Mr. Gee frequently writes and speaks on the potential opportunities and hazards created when traditional estate planning intersects with modern technology, including broader uses of electronic signatures, the debate over electronic wills, and the rise of remote notarization. The youngest of his four children won’t be able to sign estate planning documents until 2035. What will the law be then?

KATE HOLBROOK
Kate Holbrook is a leading voice in the study of Latter-day Saint women and their foodways. As a managing historian at the Church History Department, she writes, studies, and interprets history full-time. Her major research interests are women shaping and interpreting their faith and the practice of everyday religion.

Kate’s book publications include The First Fifty Years of Relief Society: Key Documents in Latter-day Saint Women’s History, Women and Mormonism: Historical and Contemporary Perspectives, and At the Pulpit: 185 Years of Discourses by Latter-day Saint Women.

KATHY LOVELESS, MS, CSP
Kathy Loveless is an international speaker and consultant who conducts retreats at her facility in the beautiful Rocky Mountains for families to help them implement plans to transfer family wealth and engage in meaningful philanthropy while keeping family relationships healthy and intact.

In 1990, Kathy founded Loveless Enterprises Inc., a professional speaking and management consulting firm with over 100 federal clients such as the CIA, the U.S. Departments of Defense, Justice, Interior, Transportation, and Veterans Affairs, and hundreds of private sector clients such as DuPont, AT&T, and 3M Company.

She has spoken throughout Europe, East Asia, New Zealand, Canada, and Africa, teaching governmental agencies how to think like a business and businesses how to develop smart business systems.
A member of the National Speakers Association Million Dollar Speaker Group, she is twice past president of the Mountain West Chapter. In 2001, the Loveless Award was created in recognition of her service, excellence, and contribution to the professional speaking industry. Since then, it has been awarded to many outstanding professional speakers. She was featured in an edition of the Learning Channel’s (TLC) national reality television show AA Makeover Story, which has now aired more than 50 times in the U.S. and internationally.

She has spent her nearly 50-year trailblazing career being either the youngest person or first woman in every aspect of her worldwide work. Her career began in 1971 as the first Hinckley Institute of Politics intern to serve in the U.S. Department of the Interior in the Washington, DC, commissioner’s office of the Bureau of Reclamation. Two weeks later, at age 22, they offered her the editorship of its nationwide magazine on water and power issues. Then she became its first public involvement officer, serving a 17-state territory, the first woman regional public affairs officer, the first producer of the story of the Colorado River in film and live performance on the Caesars Palace main stage (winning international awards), and the first woman selected to represent the United States and speak at a world congress on water in Morocco, Africa. This continued throughout her many career endeavors.

She worked on the first International Women’s Year commission with actor Alan Alda and news anchor Barbara Walters, and she was the first equal employment opportunity counselor in the Bureau of Reclamation.

After leaving government, she became the first woman vice president investment banker in Utah and then the first woman national marketing director for an independent energy firm and the first woman elected chair-elect of the Independent Energy Producers of California.

Throughout it all, she has sought to bring others along with her, beginning with hiring students to be her interns in Washington, DC, and in the western states. Today, she still runs an international mentoring program for individuals wishing to develop professional speaking and consulting businesses. She created the American Free Enterprise Success Seminar, where high school seniors are trained in setting goals, using credit wisely, and planning a career. To date, 2,727 college scholarships have been awarded.

She is a Phi Beta Kappa graduate of the University of Utah, holds a master of science degree from American University in Washington, DC, and completed all but the dissertation defense for a PhD in quantitative data analysis from George Washington University. As Miss Utah, her speaking skills won her a National Finalist Scholarship at the Miss America Pageant, and she is a member of the International Brotherhood of Magicians.

The mother of Lindsey and Amanda and grandmother of seven, she was married for 40 years to her kindergarten sweetheart, the late Scott W. Loveless, of the law firm Parr, Brown, Gee, and Loveless.

As a stage IV, non-smoker, one-lunged cancer survivor, she has bicycled from coast to coast in the U.S. and in 12 foreign countries as an example of how we can overcome adversity.
DOUGLAS H. MARTIN
Mr. Martin is the director of Treasury Services for The Church of Jesus Christ of Latter-day Saints. In this position he serves as the treasurer of the organization and is responsible for overseeing the design, development, and efficiency of all operations associated with managing the working capital of the organization.

Mr. Martin’s primary responsibilities include setting strategic direction for cash management, global funding, and payment operations globally. The organization has operations in over 180 countries and is supported by a global network of banks, financial institutions, and service providers, which are managed under Mr. Martin’s direction.

In 1988, after a few years working in operations with Zions Bank, Mr. Martin joined the treasury team with The Church of Jesus Christ of Latter-day Saints. He gained experience working in various disciplines such as global funding and foreign exchange, mortgage receivables, cash forecasting, and deposit concentration banking. Additionally, he spent eight years managing the Global Cash and Bank Relations Team. In 2007 he was named treasurer of the worldwide organization.

Mr. Martin has served in leadership positions with several national finance organizations, notably the National Automated Clearing House Association (NACHA), as a committee chair of the Corporate Payments Council, and as president of the Utah Chapter of the Association for Financial Professionals. He currently serves on several boards and is active in many volunteer capacities.

Mr. Martin studied finance and marketing at the University of Utah and has a bachelor’s degree in business administration from the University of Phoenix. He received permanent certified cash manager status in 1998 and the credential of certified treasury professional in 2006.

Mr. Martin and his wife, Suzanne, are active in the outdoors and enjoy camping, boating, and spending time with their family. They are the parents of five great kids and the grandparents of six even better kids, and they reside in West Bountiful, Utah.

M. WESLEY MASHBURN
Wes is a certified specialist in planned giving and is a member of the National Association of Charitable Gift Planners, the Nonprofit and Estate Planning sections of the Utah State Bar, the Purposeful Planning Institute, the International Association of Advisors in Philanthropy, and the Utah Valley and Salt Lake Estate Planning Councils. Wes is a past board member of the Utah Valley Estate Planning Council and the Utah Planned Giving Roundtable. Wes has been a guest lecturer at Brigham Young University in prelaw and nonprofit management courses. Before joining Philanthropies in 2001, Wes was an associate attorney at the law firm of Ballard, Spahr, Andrews, and Ingersoll in Salt Lake City. Wes has also served as a law clerk for the U.S. Senate Judiciary Committee and for the Nevada Supreme Court. Wes graduated summa cum laude from Brigham Young University in 1992 and received his juris doctor (magna cum laude) from the J. Reuben Clark Law School in 1995, where he was executive editor of the journal of Public Law and earned membership in the prestigious Order of the Coif. Wes is a director at Philanthropies.
**SPEAKER BIOS**

**JERRY L. REYNOLDS**
Jerry earned his baccalaureate 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. Jerry is a gift planning specialist at Philanthropies.

**CARL A. MCLELLAND**
Carl is a member of the Utah Bar Association, the National Association of Charitable Gift Planners, the Utah Planned Giving Round Table, and the Salt Lake Estate Planning Council. He graduated from the University of Utah with a BA 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 in 1991, he practiced law in Salt Lake City, and served as the vice president of finance and operations for the Children’s Miracle Network. Carl is a gift planning specialist at Philanthropies.

**DAVID SMITH**
David received degrees in English, Japanese, and humanities from Brigham Young University. He joined Gift Planning Services in 2014, where his responsibilities focus on donor engagement, the legacy societies, 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. David is a donor liaison for gift planning at Philanthropies.
CAROL WARNICK

A partner at Holland & Hart, Carol 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 is 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. She is also an AAA-trained mediator and mediates trust- and estate-related disputes. Carol actively practices in Colorado, Utah, and Wyoming.

DAVID R. YORK

An attorney, certified public accountant and managing partner at York Howell & Guymon, 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). David has extensive experience in designing and implementing advanced wealth-planning strategies for high-net-worth clients.

David is the coauthor of two books, *Entrusted: Building a Legacy That Lasts* and *Riveted: 44 Values That Change the World*. 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.

David 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, and photography.
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.

☐ “Charitable Planning: A Donor’s Perspective”  
Presented by Gail Miller and Kim Wilson

☐ “Widows and Their Mites: Planning for Non-Affluent Families”  
Presented by Scott Farnsworth

☐ “Church Global Treasury—The Heartbeat of the Business”  
Presented by Doug Martin

☐ “The Electronic Wills Movement: Haman’s Plot or Meant ‘For Such a Time as This’?”  
Presented by Kyle Gee

☐ “Adapt, Change, or Disappear”  
Presented by David York

☐ “What Do You Know About Planned Giving? Would You Like to Know More?”  
Panel presentation with David Bonner, Jerry Reynolds, Carl McLelland, Shalayne Davis, Jacob Dowse, and David Smith, moderated by Wes Mashburn

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Total continuing education credit hours: _______________________

DAVID BONNER
Senior Manager, Gift Planning Services, Philanthropies
RECENTLY, Craig Judd, a financial advisor, created a Deseret Trust Company donor-advised fund as a way to set aside some funds tax-free. But he says that what started off as just "a good tax play" turned into his family's "most charitable year ever" and has blossomed into a charitable awakening.

Through their donor-advised fund (DAF), Craig and his family have been able to receive immediate charitable-giving tax deductions on money invested while letting them decide later which charities to support.

"I can't imagine any DAF that doesn't make the world a better place. We're all more compassionate if we engage in helping others. Take the step and open a DAF. You'll never regret it."

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.
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