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FOUNDATION

NEWS



President's Message

My three-year term as President of The ACTEC Foundation is coming to an end. It has been an amazing and very fulfilling experience, and I am honored and deeply grateful for having been given this opportunity. As I look back at some of our accomplishments, I take pride in having worked with a great team of volunteers - and

of course our wonderful ACTEC staff - whose contributions have made these successes seem effortless.

In the three fiscal years ending this coming April 30, The Foundation will have distributed more than \$400,000 in grants, supporting some incredibly worthwhile projects. For example, we supported the three most recent Mary Moers Wenig Student Writing Competitions and the three most recent classes of Dennis I. Belcher Young Leaders. These two programs engage students and early-career attorneys in the trust and estate profession, encouraging scholarship and building future leaders in our practice area.

The Foundation supported the 2025 Lloyd Leva Plaine Lecture, "Taking Care of Business: New Approaches to Business Succession Planning," with speakers Ellen K. Harrison and Natalie Reitman White, at the 59th Annual Heckerling Institute on Estate Planning; and the 2025 L. Henry Gissel, Jr. Spirit of ACTEC Lecture, "Minnesota Nice: Collegiality in Today's Trust and Estate Practice," presented by ACTEC Past President Ann B. Burns at the 2025 ACTEC Annual Meeting.

The Foundation also continued its support for two of ACTEC's most successful public-facing programs, the ACTEC Estate Planning Essentials videos and ACTEC Trust and Estate Talk podcasts. Since their launch some nine years ago, these programs have exceeded 946,000 streams and downloads, and they continue growing in popularity.

Speaking of "public-facing," other recent projects included updating The Foundation's Mission Statement and upgrading its website, which is often the first "face" people see. The Board of Directors adopted a new Mission Statement in March of 2025 to better reflect The Foundation's grant-making priorities. The Bylaws were amended at the same time to align them with this newly restated purpose. This was followed by a reorganization and refresh of The Foundation's website in the Summer of 2025. The new website makes it easier to find information about the programs The Foundation supports, the grants The Foundation has awarded, and the process of submitting a grant proposal. And a dynamic new visual timeline brings The Foundation's history to life.

Of course, these accomplishments could not happen without the generosity of our donors as well as our volunteers. I'd like to thank every one of you who has touched The Foundation in any way over the last three years: by donating, by volunteering, by participating in Foundation programs, by viewing and downloading, or by sharing the materials produced through Foundation grants. I ask you to continue your engagement and continue spreading the word about the great work of The Foundation, just as I will do.

Finally, a great big shout-out to those ACTEC staff members whose work includes providing services for The Foundation. It has been a joy working with you!

Once again, many thanks. It's been a great ride!

Yours in service,

John T. Rogers, Jr.
President, ACTEC Foundation

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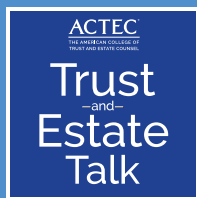
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Celebrating T&E Programs Made Possible by The ACTEC Foundation



**366 Podcasts Shared
Over 901,000 Listeners**



**91 Videos Shared
Over 145,000 Viewers**

resources have been streamed and downloaded over 946,000 times, reflecting their broad reach and enduring value to the public and the profession. Since the first Estate Planning Essentials video, "What is a Revocable Trust and Do I Need One?" launched on August 8, 2016, the series has garnered 145,000 views and 10,500 hours watched. The first Trust and Estate Talk podcast, "Engagement Letters", released on February 20, 2018, has been downloaded more than 2,575 times. Both series continue to be major drivers of public traffic to the ACTEC and ACTEC Foundation websites.

The ACTEC Foundation is proud to celebrate the extraordinary success of *ACTEC Trust and Estate Talk* and *ACTEC Estate Planning Essentials*—two of the most impactful outward-facing programs in the College's history, both made possible through Foundation funding. Together, these educational



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