Jewish Federation & Jewish Foundation of Nashville and Middle Tennessee

Professional Advisory Council

Supported by the Joe Kraft Professional Advisory Program Fund and the Harris A. and Diane Gilbert Area of Interest Fund for Education housed at the Jewish Federation & Jewish Foundation of Nashville & Middle Tennessee

2021-2022 Roster

Jewish Federation® & Jewish Foundation
OF NASHVILLE AND MIDDLE TENNESSEE

THE **STRENGTH** OF A PEOPLE.
THE **POWER** OF COMMUNITY.

The purpose of the Jewish Federation Professional Advisory Council (PAC) is to enhance the knowledge regarding the opportunities for maximizing wealth transfers to family and charity for the Nashville Jewish community. PAC members are professionals who are involved in financial and estate planning, law, accounting, life insurance, and investment planning.

If you have questions about the PAC or are interested in joining, please contact Shannon Small, Financial Resource Philanthropic Officer, at 615-354-1651 or shannon@jewishnashville.org

The information provided is for informational purposes only and is not intended as legal or tax advice. A professional advisor should be consulted to discuss your options. PAC members are not endorsed by the Jewish Federation and Jewish Foundation of Nashville and the PAC with regard to a specific expertise in a particular area of law, tax planning, or estate planning.

John Dodd

Private Wealth Advisor
Ronald Blue Trust

John Dodd is a Sr. Private Wealth Advisor for the Private Wealth division of Ronald Blue Trust and serves his clients out of the branch office in Nashville, Tennessee. As an experienced wealth advisor to individuals, families, and businesses, John uses his objective perspective to help clients make wise financial decisions, live generously, and leave a lasting legacy. His goal is to help those he serves have the clarity and confidence to focus on the things that matter most to them. John and his team integrate financial planning, investment management, and trust services into financial plans tailored to his clients' needs. Prior to joining the company, John worked for Arthur Andersen & Co. as a Tax Accountant serving individuals, corporations, and partnerships. John also worked in the banking industry in mergers and acquisitions, financial analysis, and lending. John earned his B.S. in Accounting from the University of Mississippi and his Masters of Taxation at Georgia State University. He is a CERTIFIED FINANCIAL PLANNER™ certificant, a Chartered Retirement Planning Counselor, an Accredited Asset Management Specialist, an Accredited Wealth Management Advisor, and a Chartered Mutual Fund Consultant. John is a popular financial teacher and seminar speaker, earning an "excellent" rating by the America Institute of Banking, as well as being a featured speaker at the Federal Reserve. John has appeared in Fortune magazine, Sound Mind Investing newsletter and authored a book entitled "Rx for a Medical Marriage: A Guide to Harmony" (based, in part, on his marriage to a doctor and having been reared in a medical family). He has spoken on Christian Radio and been a featured speaker for Focus on the Family and Christian Medical and Dental Society conferences. His past and present community involvement includes adjunct professor of accounting at Dekalb College, past President of InfoAdvantage Toastmasters, and Chairman of the Board of the Friends of the Susan Gray School at Vanderbilt University. John is active on the Board of the Brentwood YMCA, Leadership Brentwood, and Cool Springs Rotary. John and his wife, Kathleen, live in Brentwood and have two daughters.

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Adam Dretler

Principal
Asset Management
Diversified Trust

Adam Dretler works at Diversified Trust, a 100% employee-owned comprehensive wealth management firm based in the Southeast with over $6.5 billion of client assets under management. Diversified Trust serves individuals, multi-generational families, foundations, endowments, retirement plans, and family-owned businesses. Adam is responsible for serving both institutions and families across the United States. He is also focused on new business development.

Prior to joining the firm, Adam was a senior trader at Ziff Brothers Investments in NYC–one of the largest single family offices in the country. While working with the Ziff family, he traded global equities for a multi-billion dollar long/short equity platform. Adam also traded a wide range of global macro products including Currencies, ETF's, Interest Rates, Futures, and Commodities.

Prior to his time at Ziff Brothers, Adam worked as an equity trader for Deutsche Bank where he helped build and implement Deutsche Banks Small and Mid-Cap trading platform. Adam started his investment career as a broker on the floor of the New York Stock Exchange.

Adam is a board member of the Jewish Federation of Middle Tennessee, and is also the chair of the Investment Committee for the Jewish Federation. Adam graduated from Duke University with a Bachelor of Arts degree where he majored in History. Adam is married to Julie Riven Dretler, and has two wonderful children, daughter Ryan (6), and son Cole (5).

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William “Billy” H. Eskind

Managing Director
Financial Advisor
Wells Fargo Advisors

William, (Billy) works closely with his clients to make good, sound, strategic financial decisions. Billy values the relationships he has established with his clients and cites empathic listening and concern for their well-being as the cornerstones to developing life-long relationships. With over 26 years of experience as a Financial Advisor, Billy is dedicated to helping individuals meet their financial needs by developing investment plans that are compatible with their long-term goals and risk tolerance. Billy’s extensive experience combined with his educational background and relationship-centric focus, enable him to help his clients structure custom portfolios designed for their specific financial goals. Billy earned Bachelor’s degrees in Economics and Political Science from Duke University and a Master’s of Business Administration degree from Harvard. Billy has the honor of being named one of Barron’s Top Financial Advisors three years in a row (Top 1,000 2013, Top 1,200 2014 and 2015). He was also named one of Financial Times’ Top 400 Advisors for 2014. Billy is currently a distinguished member of Wells Fargo’s Premier Advisors, Chairman’s Council.

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Gilbert S. Fox, III

Estate Planning,
Long Term Care Planning & Life Insurance

Gil Fox solves problems encountered by business owners, professionals, and executives by offering the best available innovative products and services to accommodate their business and personal insurance, investing, long term care planning, and financial needs. He received his Bachelor’s degree from Colgate University and his MBA from Vanderbilt University’s Owen School of Management. He is a fellow of the Life Underwriting Training Council, a registered investment advisor, and a member of the Million Dollar Round Table and the Nashville Estate Planning Council. Since 1988, he has worked in the areas of financial, business, estate, insurance, retirement, and long term care planning. In addition, he started, grew, and managed a series of businesses in health care, retail, and service industries. Gil has been involved as a board member and officer for several nonprofit organizations such as the Gordon JCC, Jewish Federation of Nashville, Sertoma Club of Nashville, Big Brothers Big Sister of Middle Tennessee, Hillwood High School PTA, Youth Services/Nashville Child Center, and Nashville Alumni Association of Owen School of Management. Gill is married with three daughters, two sons-in-law, three grandchildren, two grand-cats and one grand-dog.

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Harris Gilbert

Of Counsel
Wyatt, Tarrant, and Combs

Harris Gilbert works for the Wyatt, Tarrant, and Combs Law Firm in his role as the Firm's Trustee, Estates & Personal Planning Service Team. He concentrates his practice in the areas of probate and estate planning, business and real estate law. He received his JD from the University of Chicago, and his B.A. from Yale University. He has held several fellowships and officer positions in various professional organizations such as the American College of Trust and Estate Counsel, Estate Planning Council of Nashville, Tennessee Bar Foundation, the Nashville Bar Foundation, American Bar Association, and the Nashville School of Law. He has previous experience as the Assistant District Attorney for Tennessee where he founded the Uniform Reciprocal Child Support Program for Davison County. He is a leader in the support of pro bono programs in Tennessee and is recognized as the founder of Legal Services of Middle Tennessee. He was the former chairman of the Jewish Foundation and former president of Congregation Ohabai Sholom (The Temple).

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David Heller

Attorney
Martin Heller Potempa & Sheppard, PLLC

David's practice focuses on family wealth preservation, which includes estate planning, estate tax planning, and asset protection planning. David helps clients and their families create plans to protect the family wealth from "outsiders" such as creditors, ex-spouses and divorcing in-laws. Additionally, David's advises clients on reducing their potential estate tax liability. Many of David's plans combine asset protection planning, estate tax savings and planning for the family's future generation. David also advises families with business succession issues, pre-marital agreements and charitable planning. As an extension of his estate planning practice, David also handles the probate and administration of estates and trusts after an individual's death and represents beneficiaries when controversies arise between family members. David can also help with conservatorship and guardian issues if a person becomes incapacitated. David has been awarded the top "AV" rating by Martindale-Hubbell. David is often a featured speaker at numerous seminars and teaches estate planning at various CLE courses. David graduated from Carnegie-Mellon University in 1984 with a double major in Information Systems and Math. He received his doctorate of jurisprudence with cum laude distinction from Widener University School of Law in 1994 and an LL.M. Masters in Tax Law, with honors, from Georgetown University in 1995. David serves on several boards and committees for non-profit organizations throughout the middle Tennessee area.

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Mindy S. Hirt

Senior Vice President
Wealth Advisor
Argent Trust

Mindy joined Argent Trust of Tennessee in 2012 with the opening of the company's new Nashville location. As a wealth advisor with Argent, she serves select high net worth families with trust, investment, foundation, estate and family office services. Mindy earned her B.S. at the University of Wisconsin-Madison and her MBA from Vanderbilt University. Prior to joining Argent, Mindy worked with Regions Morgan Keegan Trust for 10 years in the Private Family Services group focused on providing holistic financial services. She previously had management experience in customer service with Ford Motor Company, the Metropolitan Museum of Art, and a regional CPA firm. Her main focus is multi-generational family governance and dynamics. Her work has been recognized in a number of publications including Private Wealth Magazine, WSJ MarketWatch and Research Magazine. Mindy was a winner of the Nashville Business Journal's "Power Leaders in Finance" in 2017, "Women of Influence" Award in 2016 and the Young Leadership Award from the Jewish Federation of Nashville in 2014. She served as co-chair of the Grants Committee of the Jewish Federation. She has previously been active on the Financial Planning Association board and the Imagination Library Advisory Committee. Mindy has also served as the past chair of the Temple's Investment Committee and as a past board member of the Partnership for Philanthropic Planning of Nashville, whose mission is to inspire and educate individuals on the many ways they can make charitable planned gifts. She lives in Nashville with her husband, Kenny, and children, Jonah and Asher.

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Lee Kraft

Accountant
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Lee Kraft has more than 40 years of experience in public accounting with KraftCPAs. He received his B.A., cum laude, in Psychology with a minor in Accounting from Case Western Reserve University and his MBA, with distinction, from the University of Michigan Graduate School Of Business Administration. He is a Certified Public Accountant as well as an Investment Advisor Representative. He retired from membership in the firm in 2015 and now serves in an "of counsel" role on certain accounting, tax and consulting engagements. He also remains actively involved with the firm's wealth management affiliate, Kraft Asset Management, LLC. Over the years he has worked with clients in a variety of industries including, but not limited to, professional sports organizations, retail businesses, automotive dealers, scrap metal dealers, entertainers, manufacturers, wholesale distributors, service organizations and not-for-profit entities. Lee has consulted with numerous individuals and families on a variety of financial planning engagements, including estate and gift, philanthropic based giving and income tax planning. He has held several officer and board member positions with various organizations including the Tennessee Society of Certified Public Accountants and the Bernard Family Foundation. He also assumed leadership roles for the Legal Aid Society, Jewish Federation of Nashville and Middle Tennessee, Israel Bond Board of Governors, and the University of Michigan Alumni Association. He was named as a Power Leader in Accounting by the Nashville Business Journal in 2011, 2012, and 2013.

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Rachel Schaffer Lawson

Attorney
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It's not often you find a lawyer who understands, truly, what it's like to be an entrepreneur. But it's because of that very fact Rachel Schaffer Lawson is pretty darn good at her job. Rachel grew up in an entrepreneurial family — both her mother and grandfather owned their own businesses — so it seemed quite natural that their offspring found the study of business alluring. Rachel triple majored in marketing, entrepreneurship and music business at Northeastern University in Boston. After graduating, she attended Loyola University College of Law in New Orleans, studying business law, intellectual property law, and entertainment law (as well as the occasional beignet). Her stint in the "Big Easy" also included an internship with the National Football League's New Orleans never realized just how much she would love her job, but some of the best surprises often happen that way. She loves helping local entrepreneurs succeed in their business ventures and delights in seeing her clients open their doors for business for the very first time. When she's not striving to help business owners succeed, you can find Rachel doting on her son Declan, training for half and full marathons, trail running, cuddling one of her six "fur babies," and enjoying a local craft brew with her husband, Tyler. But to get to know Rachel a bit better, give her a call. Her infectious laugh and get-it-done attitude will brighten your day.

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Michael Levine

Wealth Manager
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Mike attended the University of Alabama and graduated from Georgia State University with a degree in Insurance and Finance. He has been in the financial services business since 1987 and is a Top of the Table member of the Million Dollar Round Table. He has been a featured speaker at many professional and business seminars. His specialty is retirement income planning. Mike holds the following professional designations: Accredited Investment Fiduciary, Chartered Life Underwriter, and Chartered Financial Consultant.

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Ralph Levy
Attorney
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Ralph Levy is a senior attorney in the Healthcare practice at Dickinson Wright. He assists and advises entrepreneurs and owners of closely-held businesses in operationalizing their business plans, including estate planning, business succession and tax planning issues thereof. Ralph has over 40 years of experience in counseling clients in the Healthcare arena. He earned his B.A. from Colgate University, his J.D. from Vanderbilt University Law School and his LL.M. in Taxation from New York University Law School. He has served as General Counsel for a national health care services provider and manufacturer of medical equipment where he gained critical operating experience and an appreciation of the need for businesses to manage their legal matters in an efficient but proactive manner. He leverages this valuable knowledge by assisting clients in establishing, operating, and expanding their businesses. Ralph also has significant experience advising boards of directors, compliance committees and senior management in connection with internal investigations and compliance related matters. His areas of practice include Corporate, Corporate Governance, Emerging Businesses, Estate Planning and Administration, Health Care, Heath Care Fraud and Abuse, Health Care Providers and Suppliers, Mergers and Acquisitions, Taxation, and Tax Controversy. His professional involvements include the Nashville Bar Association, Tennessee Bar Association, American Health Lawyers Association and the Middle Tennessee Estate Planning Council. He served as President of Congregation Ohabai Sholom (The Temple) and presently serves on the board and as counsel to the Tennessee Latin Chamber of Commerce.

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Andrew May
President and Chief Financial Officer
Truxton Trust

Andrew May serves as President and Chief Financial Officer for Truxton Trust. He became President in 2016 and Chief Financial Officer in 2010. Prior to that, he also served as Director for Truxton Trust. Previously, Mr. May was a Managing Director at Jefferies, a New York-headquartered securities firm, Partner and Director of Equity Research at J.C. Bradford and Company, and Senior Vice President, Equity Research at Equitable Securities.

Mr. May holds a Bachelor of Arts from Yale University, cum laude, and a Master of Business Administration, with distinction, from Harvard Business School. He was an infantry officer in the United States Marine Corps, receiving the Combat Action Ribbon for service in Beirut in 1983.

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Barbara Moss

Founder, Attorney
Elder Law of Nashville

Barbara Moss, the founder of Elder Law of Nashville, has been practicing law in Nashville since 1977. She focuses her practice on elder law, conservatorships, probate and alternative dispute resolution.

Barbara has been named "Best of the Bar" (one of the 70 best lawyers in Nashville) multiple times by peers in Nashville (most recently in 2020), was named 2022 Lawyer of the Year in Elder Law by her peers, has been chosen as a Mid-South Super Lawyer in Elder Law by *Law & Politics Magazine*, (2006-present), has been listed in *Nashville's Best Lawyer*s, (2011-present, most recently in the Law of Trust and Estates); and was named by peers to be included in *The Best Lawyers in America*© in the practice areas of Commercial Litigation, Litigation - Construction, Litigation - ERISA, Litigation - Labor & Employment and Litigation - Trusts & Estates (2005—present);

Barbara is currently on the faculty of the Nashville School of Law where she teaches Elder Law. She was an Adjunct Professor of Law at the Vanderbilt School of Law from 1984 to 2000.

Barbara was the first woman to chair the Board of Professional Responsibility of the Supreme Court of Tennessee, the organization responsible for all attorney ethics and discipline in Tennessee. She has been recognized for her contributions to the law profession and the community with numerous honors including the Athena Award in 2007, induction into the YWCA Academy of the Women of Achievement in 2008, the Molly Todd Cup in 2009 presented by Nashville networking organization CABLE, and Nashville Business Journal, Women of Influence in 2007.

Barbara is a 1977 graduate of Vanderbilt University School of Law. For many years Barbara was a contributing writer for *The Tennessean*, where her column appeared in the business section.

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Harry Perret

Owner
The Oak Tree Advisors

Harry Perret specializes in all things Medicare. He works to simplify the Medicare process while eliminating gaps in coverage and minimizing financial responsibility. Harry's clients often call him, "The Medicare Man" in recognition of his passion and expertise.

Harry was the 2019 Rotarian of the Year with the William (Bill) Warner Award with the Green Hills Rotary.

Having access to all the Medicare plans available in Tennessee, he is able to design the best coverage for his client's needs. His expertise is often sought out by local organizations and senior housing residences for speaking engagements. He is an active volunteer with Meals on Wheels and St Luke's Community House.

As the owner of The Oak Tree Advisors his focus is helping older residents navigate hundreds of federal and state programs that potentially offer resources to vulnerable seniors. His work encompasses assistance with the initial application for Medicare through to the implementation of the plans with continuing customer service. His objective is to enable clients to access the highest quality health care while minimizing their financial risks. His greatest pleasure is to work with vulnerable populations that face the greatest health and financial challenges.

- Navigating the Medicare Maze
- What are my choices with Medicare?
- What are the fees with Medicare?
- Are there penalties if I do not take Medicare?
- Can I go out of state for healthcare?
- Is dental included with Medicare?
- How can I lower my prescription costs?
- How can I get Medicare Extra Help?
- How do I sign up for Medicaid?

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Eva Pulley

Senior Manager, Tax Services
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Eva J. Pulley, CPA, CSEP, is a senior manager in the tax services department of KraftCPAs. With 33 years of public accounting experience, Eva specializes in estate and trust planning, taxation and administration. Eva joined KraftCPAs in 2016 and brought with her a practice that provides services for high income and high net worth clients. She oversees the accounting and tax services for several corporations, partnerships, estates and trusts as well as individuals. She works with numerous estate and trust attorneys and investment managers to plan for the preservation, increase and transfer of family wealth. Eva earned a Bachelor of Business Administration degree from Austin Peay State University. Eva completed the estate planning program offered by the National Institute for Excellence in Professional Education, LLC and was awarded a Specialist in Estate Planning Certification in June of 2000. She continues to attend and participate in education programs to maintain a current understanding of the law as changes are made that relate to income taxation and the taxation of the transfer of wealth. Eva is a member of the American Institute of Certified Public Accountants, Tennessee Society of Certified Public Accountants and the Middle Tennessee Estate Planning Council.

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Rodney Rosenblum

Life Insurance and Related Products Broker
Managed Benefits, Inc.

Rodney is a Nashville native and has spent his entire life living in Nashville with the exception of a three-year service in the U.S. Army as an Infantry Combat Officer during the Vietnam War. He is a graduate of Vanderbilt University. Rodney is an alumnus of Leadership Nashville and has been a division chairman of the Nashville United Way. He also is a supporter of the Tennessee State Museum. He has been on the boards of several local Jewish organizations including the Gordon Jewish Community Center and the Jewish Federation. He is a past President of West End Synagogue and Akiva School. An extensive background in working with medium and large corporations in the area of the use of life insurance for deferred compensation, split-dollar life insurance plans, salary continuation plans and executive disability planning.

In the individual family area, he has worked with numerous CPAs and tax attorneys related to financial and estate planning where the use of life insurance is indicated. He has experience in the use of life insurance for charitable legacy giving under a number of different scenarios. He also has been hired as an expert research consultant by one of the largest national law firms in a suit between individual life policyholders and a major life insurance company. Rodney was the chairman of an advisory committee for a multi-billion-dollar international life insurance carrier and worked with the company in the areas of life insurance pricing and product design. He has lectured both nationally and internationally to agent groups in the areas of estate planning and worksite marketing.

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CHARTERED LIFE UNDERWRITER (CLU)
REGISTERED EMPLOYEE BENEFITS CONSULT (REBC)
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Howard Safer

Trust CEO
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Howard joined Argent Trust Company in April 2012 as its Chief Executive Officer. As CEO, he serves families providing trust, investment, estate and family office services. Howard has more than three decades of experience. He received his BA in Economics at Vanderbilt University and his MBA from Tulane University. He is a Certified Public Accountant. Prior to joining Argent, he has served as President of a 900 million trust company, the Managing Partner for a 90 person CPA and consulting firm, a Chief Financial Officer for a substantial private company and a Controller for a NYSE public company. Research Magazine honored Howard as one of five advisors nationwide inducted in the 2012 Hall of Fame. The October 2007 issue of Worth magazine named Howard as one of "The Top 100 Wealth Advisors". JK Lasser's New Rules for Estate and Tax Planning recognized Howard as a "Top Professional Advisor" in 2002. Howard has been included numerous times in Worth's Best Financial Advisor listings. In 1998, he was presented "The Outstanding CPA in Business and Industry Award" in recognition of his business achievements by the Tennessee Society of CPAs. The Society also presented Howard a leadership award for "Dedication to Excellence" in 2000. In December 1999, Ticker magazine named Howard as one of the top five Ace Advisors in the nation. The magazine noted his work for his clients as being among the "Most Innovative Investment Professionals". In March 1998, Howard was featured in the Dow Jones Investment Advisor story, "Top Billing" for his leadership in managing wealthy clients' estates.

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Martin J. Satinsky

Accountant
Martin J. Satinsky, CPA

Marty Satinsky has been providing tax and financial planning services to individuals and businesses for over forty years. He has worked with regional and international accounting firms, including seven years as a tax partner with Coopers & Lybrand. Mr. Satinsky currently practices in his own accounting firm. As a partner in the accounting firm of Smart and Associates, LLP, Mr. Satinsky specialized in tax consulting for high net worth individuals and closely-held businesses. As Director of Professional Development, he was also responsible for the Firm's training and Continuing Professional Education (CPE) program through Smart University. A frequent lecturer, Mr. Satinsky has also been an instructor at the American College, Temple University Law School, Georgetown University Law School, Syracuse University Law School, the University of Pennsylvania, Philadelphia University and the Owen Graduate School of Management at Vanderbilt University. Mr. Satinsky is a graduate of the Pennsylvania State University and the Law School of the University of Pennsylvania. He received his Master of Law degree in Taxation from Temple University Law School. Mr. Satinsky is a Certified Public Accountant in Tennessee. He is a lifetime member of the American Institute of Certified Public Accountants, and the Pennsylvania Institute of Certified Public Accountants, and is a member of the Tennessee Society of Certified Public Accountants. He has served as an officer of the Philadelphia Estate Planning Council and as a member of the AICPA Personal Financial Planning Executive Committee and the PICPA Personal Financial Planning Committee. Marty is a past Chairman of the Jewish Community Centers of Greater Philadelphia. He has also served as the Treasurer of Hillel of Greater Philadelphia and a member of the National Board of the Jewish Community Center Association and the Maccabi Continental Games Board. He has been active with the Federation of Jewish Agencies in Philadelphia, Washington, D.C., Syracuse, NY and Nashville, TN. In Nashville he has also served as the Treasurer of Vanderbilt University Hillel and Congregation Sherith Israel. He is currently the Vice President of the Jewish Middle School of Nashville.

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Melisa Silverman

President
Avenue M© Advisors, Inc.

Melisa Silverman is President of Avenue M Advisors, Inc., a national business valuation services company. Avenue M provides business valuations for both successful families implementing wealth transfers and business owners planning for growth, regulatory compliance, litigation, acquisition, taxation and transition strategies. She also consults with companies to help them build financial process improvements, sales and marketing support, due diligence and much more.

Melisa is also the Managing Partner of The Founders Group, a national company focused on providing business succession and transition services for closely held companies using a holistic and collaborative process that interferes the least in a business, yields business results increasing cash flow, profits and business value and frees up time for the business owner.

The valuation reports are compliant with USPAP and NACVA standards as well as compliant with the requirements of the IRS, SEC, ERISA and DOL. Ms. Silverman is a certified exit planning advisor through the Exit Planning Institute (EPI), and certified valuation analyst through NACVA, a senior business analyst through the International Society of Business Analysts (ISBA) and a certified machinery & equipment appraiser through the National Equipment and Business Brokers (NEBB).

The Founders Group utilizes a holistic and collaborative process to plan and implement a business transition plan for a business owner seeking to exit their business in the near to distant future.

Melisa has a BA from Indiana University and a JD from Nova Southeastern Shepard Broad Law Center.

Ms. Silverman was the 2018 recipient of the Peter Christman Exit Planner of the Year Award from the Exit Planning Institute and she was a 2017 Nominee for Leader of the Year Award from the Exit Planning Institute.

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Lee Slotnik

Alternative Investments Director & Financial Advisor, Morgan Stanley

As an Alternative Investments Director and Financial Advisor at Morgan Stanley, I serve individuals, businesses, and foundations to help them best navigate through and optimize their financial opportunities. I invest the time to thoroughly understand the client's big picture and craft individual strategies to help them achieve their financial needs and goals. I leverage my experience in the areas of investment management, tax and estate planning strategies, lending solutions, corporate retirement, and risk mitigation to proactively bring strategies and solutions that balance a client's financial and emotional motivations.

Client Service Offerings:

- Portfolio Management & Asset Allocation
- Alternative Investments, including Private Equity, Private Credit, Hedge Funds, REITS, Managed Futures, etc
- Financial Risk Management
- Liquidity Event Management
- Financial Planning and Execution
- Cash Management and Lending Solutions
- Business Succession Planning, Estate Planning Strategies, Life Insurance
- Long Term Care & Long Term Disability Insurance
- Corporate 401k and Not for Profit 403b Retirement Plans, Defined Benefit Plans, SEP Plans
- 529 Education Savings Plans

I graduated from Ohio State University obtaining a BSBA with majors in Finance and Accounting in 1988.

I have been a Certified Public Accountant (non-practicing at Morgan Stanley) since June 1991.

My licenses include:

- Series 66
- Series 7
- Life, Accident, & Health Variable Contracts
- NMLS Registered Advisor

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Kimbra Spann

Attorney
Legal Spann

Kimbra Spann is an effective and ethical advisor, and advocate, with 35 years of experience in estate planning, real estate law and litigation, characterized by front line responsibility in top law firms, the Tennessee State Attorney General's Office and the Board of Professional Responsibility. She is licensed in Tennessee and Georgia (currently inactive in Georgia).

Ms. Spann started her legal career in 1985 doing high profile litigation for the Tennessee State Attorney General's office, which has provided an advantageous background for her estate planning and real estate practice. Moving away from litigation in 2001, she has since worked at prestigious title companies and law firms, including in a management capacity, to further the financial needs and goals of her clients. With substantial experience in wills, trusts, powers of attorney, and advanced directives, she can provide planning for a client's overall financial goals, and assurance that their objectives are being met in an ethical, efficient manner. With experience as an adjunct professor in a local college paralegal program, she is adept at communication with her clients. Ms. Spann is the founder of Legal Spann, a firm conveniently located in the Cool Springs area of Franklin and Berry Hill, a 5 Star Title of Tennessee, LLC, where she can assist with estate planning and real estate transfers, as well as advise small businesses. She acts as outside General Counsel to Greater Nashville Realtors, a local trade association. As a complement to her practice, she is also the owner of Asset Exchange 1031, LLC, a company that can act as Qualified Intermediary for real estate investors who seek to defer capital gains on their real property transfers. She is a member of the Nashville Bar Association, the Tennessee Land Title Association, and the Marion Griffin Chapter of the Lawyer's Association for Women.

Ms. Spann lives in Thompson's Station, Tennessee with her husband. She serves on the Board of Directors of the Tennessee Breast Cancer Coalition and is active in Breakfast Club of Nashville, a group of women professionals.

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David Steine

Investment Advisor
TrustCore

David Steine is an investment adviser with TrustCore, a registered investment adviser. He began his career in the investment field in 1979 in the Trust Investment Division of Third National Bank in Nashville. From 1985 until 2016 he served as a partner and portfolio manager at The Steine and Gooch Company, an independent investment advisory firm that offered portfolio management services to individuals. He holds BA and MBA degrees from Vanderbilt University. He is a member of the CFA Society of Nashville.

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Dalih Suchet

CLTC, LTCP
Whitehall Benefits

Dalih Suchet, CLTC, LTCP wants everyone she works with to enjoy the same sense of protection, assurance and peace of mind that comes from protecting their most important assets: their families and themselves. She feels most rewarded when distilling complex financial information into an easy-to-understand road map that allows those she is advising to make informed decisions and enhance their long-term financial security.

Born in South Africa and raised in several cities in the United States, Dalih came to Nashville right after earning her B.A. in public speaking and communications. Dalih has her CLTC and LTCP designations in long-term care insurance.

In 2000, she co-founded Whitehall Benefits to help both corporations and individuals find long-term care insurance solutions that match their budget and goals. One of only a few long-term care specialists in Nashville, Dalih represents all major carriers and has a comprehensive understanding of both traditional and hybrid plans. This gives her the ability to thoroughly customize plans, as well as collaborate with financial advisors and other industry professionals. She begins by carefully listening to needs and objectives. She then analyzes any gaps in planning and researches suitable best-in-class options. The result is a succinct and understandable "executive summary" valued by clients and advisors alike. Dalih has been tapped as an expert resource for several articles and speaking opportunities.

She has founded two business networking organizations (WEB and Aging 360). She leads the Business Development Committee for Leadership Middle Tennessee (class of 2018) and is an active board member. She has been an active volunteer with Junior Achievement. She is a member of the American Association for Long-Term Care Insurance.

Dalih lives in Nashville with her husband. She has two adult children, Margot and Alexandra. The Suchet family have been members of The Temple since 2005.

For information about long-term care Insurance, contact Dalih at dalih@whitehallbenefits.com.

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(800) 289-7724 (toll free) | (615) 742-8713 (confidential fax)

Michael F. Whitney

Financial Advisor
Wise Family Wealth

Michael Whitney is a Financial Advisor with Wise Family Wealth, LLC. He is dedicated to helping individuals and families understand investment and planning strategies.His educational focus helps clients build confidence to take action steps toward retirement and other personal goals. None of us knows the future. However, professional guidance can be instrumental in helping everyone be better prepared to face uncertainties that may head their way.

Michael is a member of Financial Planning Association and a Chartered Retirement Planning Counselor ℠. Michael earned his MBA from the University of Southern California's Marshall School of Business. His training includes passing the AICPA Uniform CPA Exam.

Michael is active in interfaith community relations with **Circle of Friends** and **Family of Abraham**. He has served on the Congregation Micah Board of Trustees and is a founding board member of Nashville's www.IntersectionMusic.org and www.NashvilleJungCircle.org. Michael was nominated for the **Mary Catherine Strobel Volunteer of the Year Award** for work at Percy Priest Elementary School. He is the producer of the documentary film ***"Matter of Heart,"*** featuring the extraordinary journey of C. G. Jung into the soul of man.

Michael F. Whitney, MBA, CRPC
Financial Advisor Wise Family Wealth, LLC
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At the Jewish Federation and Jewish Foundation of Nashville & Middle Tennessee we are building a better world through *Tikkun Olam*. What do you support? Local Jewish education? Global relief efforts? Clean water? However you want to "repair the world," The Jewish Federation & Jewish Foundation connects you with causes and organizations that embody your values.

With years of experience under our belts, we provide you and your family with unique Jewish philanthropic expertise and support, valuable tools, and the professional know-how to make your charitable planned giving personalized, thoughtful, and tax beneficial.

Why choose the Jewish Foundation?

- **Give through a Jewish lens**
- **Maximize tax benefits**
- **Administration of your fund and professional investment**
- **Utilize staff assistance throughout the giving process to deliver support according to your charitable interests,**
- **Benefit from our Jewish community expertise, relationships and stewardship.**

Our competitive administrative fees go back into the Jewish community, creating a double mitzvah.

GIVING OPTIONS

WAYS TO ASSURE JEWISH TOMORROWS

Have you considered making a lasting gift to YOUR Jewish community?

The goal of planned giving is to help you plan your estate and charitable giving in a way that benefits you, your family and charity. There are many ways you can make these planned gifts and enjoy tax and income benefits.

Your Goal	How It Works	Your Benefits	Your Gift
• Maintain control of your assets during life • Make a gift to charity at your death	You designate TJF and/or an Affiliate as the beneficiary of an amount or percentage of your estate by will, trust or other instrument.	• Estate tax charitable deduction • Life use and ownership of your property	**BEQUEST**
• Guarantee a specific gift amount • Reduced cash outlay supporting larger future gift	Purchase a new policy (or transfer an existing policy*). You name TJF and/or Affiliate as owner and beneficiary.	• Charitable deduction for premiums donated • Make larger gift than you thought possible	**LIFE INSURANCE**
• Transfer appreciated property avoiding capital gains tax. • Regular income for life or a term of years • Receive the benefit of tax savings from a charitable deduction	You transfer cash or appreciated property to fund a charitable trust. The trust provides you or family members with income for life or a term of years.	• Charitable deduction • Income for life or a term of years • Possible income growth over time • Avoidance of capital gains tax	**CHARITABLE REMAINDER TRUST (CRT)**
• Transfer appreciated property avoiding capital gains tax • Income to charity for life or term • Avoid substantial gift or estate tax • Reduced transfer cost to heirs	You transfer cash or property to fund a lead trust that makes gifts to TJF and/or Affiliate for a number of years. You may receive a charitable deduction. When the trust term ends, your family receives the remainder interest at substantial tax savings.	• Gift or estate tax deduction • Asset and appreciation passes to family at a reduced transfer cost	**CHARITABLE LEAD TRUST (CLT)**
• Remain in your home for life • Receive a current charitable income tax deduction	You gift property to TJF but retain the right to use the property during your life. You pay maintenance, insurance, and property taxes.	• Charitable deduction • Lifetime use of property	**LIFE ESTATE RESERVED**
• Make a gift to charity at your death • Name TJF and/or Affiliate as a beneficiary	You complete a change of beneficiary form, no cost involved.	• Estate tax charitable deduction • Lifetime use of asset/income • Avoid or reduce income taxed to heirs	**IRA OR PENSION PLAN**

Jewish Federation & Jewish Foundation OF NASHVILLE AND MIDDLE TENNESSEE

LIFE & LEGACY
Assuring JEWISH TOMORROWS
A program of the HAROLD GRINSPOON FOUNDATION

Letter of Intent

In keeping with Jewish tradition, I/we wish to share my/our blessing with others. Therefore, I/we make this declaration to help provide for the needs of tomorrow.

○ I/we have already made a legacy provision in my/our estate plan.

○ I/we intend to create a Jewish Legacy and will formalize my/our gift within __________ months of signing this Letter of Intent.

Donor Signature:____ Date:____________________

Donor Signature:____ Date:____________________

PLEASE PRINT

Name(s) ____Birthdates______________________

Address ____

City ____ State _________ Zip ______________________

Day Phone ___________________________ Email Address_____________________________________

Please check the community partner organization(s) that will benefit from your legacy gift.

○ Akiva School
○ Nashville BBYO
○ Chabad of Nashville
○ Congregation Micah
○ Congregation Sherith Israel
○ Gordon Jewish Community Center
○ Nashville Hadassah
○ Jewish Family Service
○ Jewish Federation & Jewish Foundation (including the Nashville Holocaust Memorial)
○ National Council of Jewish Women
○ The Temple – Congregation Ohabai Sholom
○ Vanderbilt Hillel
○ West End Synagogue
○ Other: ______________________________

The source of my/our legacy gift will be from the following (check all that apply):

○ Bequest ○ Life Insurance ○ Retirement Plan Assets (IRA) ○ Charitable Remainder Trust
○ Charitable Gift Annuity ○ Gift of Real Estate, Securities, other property
○ Other ____

The approximate value of my/our commitment will be $______________ or ______________% of my/our estate.

The above intended beneficiaries may be notified of my/our legacy commitment and notified of my/our name(s).

○ I/we would like my/our gift to remain anonymous at this time.

I/we understand that this is not a legal document. It serves as a commitment indicating my/our heartfelt promise to provide for the support of the Jewish charitable causes that are important to me/us.

Thank you for your enduring and meaningful commitment to our Nashville Jewish community for today and for future generations.

www.jewishnashville.org/legacy

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Norma Shirk
LIFE & LEGACY Associate

The LIFE & LEGACY™ program is sponsored by the Jewish Federation & Jewish Foundation of Nashville in partnership with the Harold Grinspoon Foundation. The Nashville Jewish community has embraced the program encouraging community members to leave after-lifetime gifts which will provide endowment resources to Jewish organizations. The Professional Advisory Council seminars provide an opportunity to explore options for formalizing their legacy to Jewish organizations in Nashville.

PARTICIPATING AGENCIES

Akiva School
bbyo
Chabad of Nashville
Jewish Family Service
Vanderbilt Hillel
NCJW National Council of Jewish Women
Congregation Sherith Israel
Congregation Micah
Gordon JCC Nashville
Hadassah
The Temple Congregation Ohabai Sholom
West End Synagogue
Jewish Federation & Jewish Foundation of Nashville and Middle Tennessee

Jewish Federation & Jewish Foundation
OF NASHVILLE AND MIDDLE TENNESSEE

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