

PERSONAL ESTATE PLANNING CONSULTING SERVICE



The Arts Council of Moore County is committed to a vibrant and financially secure community and offers a confidential, one-hour review of your estate planning strategy and financial plan as a continuing service to our friends and benefactors.

The sessions are conducted by our philanthropic consultant, James E. Connell, FAHP, CSA. Jim is paid a set fee by Arts Council to conduct its charitable estate and gift planning program, and he does not sell or promote commercially available financial products.

If you need further assistance with the development or implementation of your plan, you will be referred to your personal advisors. The personal estate planning consulting service is complementary, and all information is confidential.

JAMES E. CONNELL, FAHP, CSA

James E. Connell, FAHP, CSA has an active forty-year involvement in fundraising and charitable estate planning. He currently helps charities throughout the U.S. and Canada grow their future endowment funds while helping donors increase their income and decrease their taxes.

Jim holds B.S. and M.Ed. degrees, is a Fellow of the Association of Healthcare Philanthropy (FAHP), and a Certified Senior Advisor (CSA). His careers include a college professor, fundraiser, and consultant in estate and gift planning.

He has held positions at the Society for the Propagation of the Faith, Presbyterian-University of Pennsylvania Medical Center, Robert Packer Hospital/Guthrie Clinic and Donald Guthrie Foundation for Medical Research, Medical College of Pennsylvania Hospital, and Duke Children's Hospital.

Jim is involved in several professional and civic activities. He has published over 55 articles, several book chapters, and is an experienced speaker. He has twice received the AHP Professional Papers Award, first in 1992 for his work on "Demographics and the Changing Landscape of Planned Giving" and again in 1997 with Richard Green, JD, FAHP for their work on American Healthcare Endowments. In 1997 he was the 27th recipient of the prestigious AHP Harold J. (Si) Seymour International Honors Award, the profession's highest honor.

He founded James E. Connell & Associates, a fundraising and consulting firm, in 1989. The firm provides charitable estate and gift planning services to nonprofit organizations in the U.S. and Canada, and performs development audits to improve the strategy to obtain long-range endowment growth. Jim served on the Editorial Board of Planned Gift Mentor, published by *Planned Giving Today* during its years of publication. (October 28, 2024)

To arrange a complementary session with Mr. Connell, please contact:

Chris Dunn, Executive Director – 910-692-2787 | chris@mooreart.org

Ray Owen, Development Director – 910-692-2787 | ray@mooreart.org

NOTE: This information is taken from sources believed to be reliable but is not guaranteed as to completeness or accuracy. You are urged to seek the advice of your financial planner, attorney, and/or tax advisor to make certain a contemplated gift fits well into your overall circumstances and planning.