The Planned Giving Team

We’re here to help! Contact us with questions in our respective areas

Mary Beth Congdon
*University Director, Planned Giving*

\[\text{T 203.432.5471} \quad \text{E marybeth.congdon@yale.edu}\]

- Team management
- Collaboration with gift officers and donors university-wide on life income gifts (charitable gift annuities and charitable remainder trusts), bequest intentions, real estate, gifts in kind, and individual retirement accounts
- Marketing
- Training

George Atwood
*Senior Director, Gift Investment and Administration*

\[\text{T 203.432.1724} \quad \text{E george.atwood@yale.edu}\]

- Existing Yale annuities, pooled funds, charitable remainder trusts
- Yale trust investments
- Yale trust or annuity tax questions
- Yale donor advised funds
- Financial calculations, general investments, spreadsheets

Scott Hunter
*Director, Special Assets*

\[\text{T 203.432.4102} \quad \text{E scott.hunter@yale.edu}\]

- Due diligence on acceptance and administration of non-cash gifts including public and private securities, real estate, oil and gas interests, life insurance, intellectual property, collectibles
- Oversight of realized bequests especially from complex estates

Cate McDonough
*Deputy Director, Planned Giving*

\[\text{T 203.436.8516} \quad \text{E caitlin.mcdonough@yale.edu}\]

- Drafting and reviewing of gift agreements
- Collaboration with gift officers and donors university-wide on life income gifts (charitable gift annuities and charitable remainder trusts), bequest intentions, real estate, gifts in kind, and individual retirement plans
- Marketing
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Kyle Misenti
Manager, Bequests and Endowments
T 203.432.0505
e kyle.misenti@yale.edu

- Management of realized bequests
- Designation of realized bequests
- Outside trusts
- Indentures for new endowments and other gift agreements

Karen A. Kustra
Assistant Director, Special Investments
T 203.432.5882
e karen.kustra@yale.edu

- Donated securities all stock, mutual fund, bonds etc. (non-cash gifts)
- Forms 8283 & 8282
- Donor advised funds

Carol Santora
Assistant Director, Planned Gift Administration
T 203.432.0857
e carol.santora@yale.edu

- Charitable gift annuities and pooled income funds, administration, maintenance, closures and distributions
- Donor advised funds reporting
- Financial accounting for planned gifts

Betsy D. Gorecki
Senior Planned Giving Specialist
T 203.432.8490
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- Yale Legacy Partners
- Bequest intentions
- UK Friends of Yale
- Hong Kong Trust
- Life income gifts
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Carol-Anne Gaetano
Trust & Estates Specialist
T 203.432.6650
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• Administration of realized bequests
• Status of collection of estate gifts
• Monitoring of gift designations

Anne Schwartz
Program Coordinator
T 203.432.4487
e anne.schwartz@yale.edu

• Planned Giving prospect research and reporting
• Marketing, stewardship, training support
• Life income gifts support