The Planned Giving Team

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

Mary Beth Congdon
University Director, Planned Giving
203.432.5471
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 ’92 MBA
Senior Director, Gift Investment and Administration
203.432.1724
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

Gena Lai
Director, Special Assets
203.432.4677
genatowedani@yale.edu

- Due diligence for acceptance of proposed non-cash gifts, including but not limited to public and private securities, securities funds, limited partnership interests, real estate, oil and gas interests, life insurance, intellectual property, and collectibles (“special assets”)
- Administration, management, and sale (if appropriate) of special assets

Cate McDonough
Deputy Director, Planned Giving
203.436.8516
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
The Planned Giving Team

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

Marni Smith Katz
Associate Director, Planned Giving
203.432.6099
marni.smithkatz@yale.edu

- Management, solicitation and stewardship of individual pool, with prospects located nationwide.
- Partner in volunteer engagement and management and general resource for planned giving inquiries.
- Collaboration with gift officers and donors university-wide

Kyle Misenti ’04
Manager, Bequests and Endowments
203.432.0505
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
203.432.5882
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
203.432.0857
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
The Planned Giving Team

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

Betsy D. Gorecki
Senior Planned Giving Specialist
203.432.8490
betsy.gorecki@yale.edu

- Yale Legacy Partners
- Bequest intentions
- UK Friends of Yale
- Hong Kong Trust
- Life income gifts

Carol-Anne Gaetano
Trust & Estates Specialist
203.432.6650
carol-anne.gaetano@yale.edu

- Administration of realized bequests
- Status of collection of estate gifts
- Monitoring of gift designations

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

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

Ellasandra Davis
Senior Administrative Assistant
203.432.7022
ellasandra.davis@yale.edu

- Donated securities support
- Gifts in kind/823 & 8282 support
- Financial accounting support