The Planned Giving Team

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
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<tbody>
<tr>
<td>Mary Beth Congdon</td>
<td>University Director, Planned Giving</td>
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</tbody>
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- **Mary Beth Congdon**
  - 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**
  - 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**
  - 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**
  - 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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- 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

**Marni Smith Katz**  
*Associate Director, Planned Giving*

203.432.6099  
marni.smithkatz@yale.edu

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

**Kyle Misenti**  
*Manager, Bequests and Endowments*

203.432.0505  
kyle.misenti@yale.edu

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

**Karen A. Kustra**  
*Assistant Director, Special Investments*

203.432.5882  
karen.kustra@yale.edu

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

**Carol Santora**  
*Assistant Director, Planned Gift Administration*

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carol.santora@yale.edu

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Betsy D. Gorecki
Senior Planned Giving Specialist
203.432.8490
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- Yale Legacy Partners
- Bequest intentions
- UK Friends of Yale
- Hong Kong Trust
- Life income gifts

Carol-Anne Gaetano
Trust & Estates Specialist
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
203.432.4487
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- 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/8283 & 8282 support
- Financial accounting support