

CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

Program Participants

- 2012 -

ACCOUNTING

Ken Patry

Goracke & Associates, PC

Jeff Snyder

Lutz & Company, PC

Larry Tennison

Seim Johnson, LLP (retired)

LAW

Sharon Kresha

Baird Holm LLP

Nick Taylor

Fitzgerald, Schorr

Mark Weber

SilverStone Group Inc.

FINANCIAL SERVICES

Jason Hiley

Hiley Hunt Wealth Management

Susan Koesters

D.A. Davidson & Co.

Joe Vlock

New York Life

NONPROFIT

Sara Boyd

Omaha Community Foundation

Pat Crisler

Metropolitan Community College Foundation

Steve Scholer

Creighton University

DONOR

Ron Quinn

Tenaska

- 2013 -

ACCOUNTING

Pete Froelicher

Lutz & Company, PC

Matt Mercer

Deloitte

Greg Harr

O'Donnell, Ficenec, Willis & Ferdig, LLP

LAW

Gary Gotsdiner

McGill, Gotsdiner, Workman & Lepp, PC

Tom Kelley

McGrath North

Rob Likes

Likes Meyerson Hatch LLC

Tom Malicki

Abrahams Kaslow & Cassman LLP



Omaha Community
Foundation

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Program Participants

- 2013 CONTINUED -

FINANCIAL SERVICES

Jim Ambrose

Merrill Lynch

Bob Bertsch

Wells Fargo Bank Nebraska

Dan Lindstrom

UBS Financial Services

NONPROFIT

Matt Darling

Omaha Community Foundation

C.K. Duryea

Children International

Howard Epstein

Jewish Federation of Omaha Foundation

Erin Swanson Russell

Heider Family Foundation

- 2014 -

ACCOUNTING

Tom Hosier

Boyle Hess & Elliott

Jim Sousley

Seim Johnson, LLP

Kim Sucha

KPMG

LAW

Dan Guinan

Fraser Stryker PC LLO

Brandon Hamm

Koley Jessen PC LLO

Mike Weaver

Vandenack Weaver LLC

FINANCIAL SERVICES

Bob Mundy

Mundy & Associates

Kevin Welsh

Morgan Stanley

Marietta Luellen

First National Bank

NONPROFIT

Jeremy Belsky

Boys Town

Mike Findley

Creighton University

Tracy Madden-McMahon

Methodist Hospital Foundation



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Foundation

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Program Participants

- 2015 -

ACCOUNTING

Andrew Guill
RSM

Steven Kenney
Lutz & Company, PC

Leonard Sommer
Hancock & Dana, PC

LAW

Jesse Sitz
Baird Holm LLP

Sean White
Cline, Williams, Wright, Johnson & Oldfather, LLP

David Wilson
Valentine O'Toole

FINANCIAL SERVICES

Dale Christenson
UBS Financial Services

Brian Miles
Bridges Investment Management

Stacie Neussendorfer

Robert Wellendorf
Executive Solutions

NONPROFIT

Katie Bakhit
Duchesne Academy of the Sacred Heart

Terri Fallin
Sisters of Mercy of the Americas

Stacey Goodman
Omaha Community Foundation

Robert Skrydlak
Creighton University



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CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

Program Participants

- 2016 -

ACCOUNTING

Troy McKinney
Bland & Associates PC

Janet Osborn
Hancock & Dana, PC

Lisa Strutzel
GWR Wealth Management, LLC

LAW

Dan Dittman
Erickson & Sederstrom

Jon Grob
McGrath North

Daniel Waters
Lamson Dugan & Murray, LLP

Alex Wolf
Koley Jessen, PC, LLO

FINANCIAL SERVICES

Jim Boulay
Lutz Financial

E.J. Militti
Morgan Stanley

Eryka Morehead
Collaborative Planning Group

Joe Reding
Pinnacle Trust Services

NONPROFIT

Linda Garbina
The Salvation Army

John Glenn
Madonna Rehabilitation Hospital

Steven Hill
University of Nebraska Foundation

Louri Sullivan
Jewish Federation of Omaha Foundation



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CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

Program Participants

- 2017 -

ACCOUNTING

Ralph Dovali
Hancock & Dana, PC

Mike McDevitt
BKD

Andrew Worthington
Frankel Zacharia, LLC

LAW

Amanda Forker
Pansing, Hogan, Ernst & Bachman

James Tews
Koley Jessen, PC, LLO

Kelli Watson
Fitzgerald, Schorr, Barmettler & Brennan, PC, LLO

FINANCIAL SERVICES

Daniel Kline
First National Bank

Megan McMurry
Bridges Trust

Thomas Sudyka
Lawson Kroeker Investment Management

NONPROFIT

Karen Cimpl Hotz
Marian High School

Renee Coughlin
MOSAIC

Tom Kerfoot
Children's Hospital & Medical Center Foundation

Shannon Sands
Omaha Community Foundation



Omaha Community
Foundation

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