

CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

Program Participants

- 2012 -

ACCOUNTING

Ken Patry

Verdant Group (retired)

Jeff Snyder

Lutz & Company, PC

Larry Tennison

Seim Johnson, LLP (retired)

LAW

Sharon Kresha

Baird Holm LLP

Nick Taylor

Fitzgerald, Schorr

Mark Weber

Legacy Spectrum Consulting

FINANCIAL SERVICES

Jason Hiley

Hiley Hunt Wealth Management

Susan Koesters

D.A. Davidson & Co.

Joe Vlock

New York Life

NONPROFIT

Sara Boyd

VidaNyx

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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CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

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

Robert B. Daugherty Water for Food Global Institute

Erin Russell

Heider Family Foundation

Howard Epstein

Jewish Federation of Omaha Foundation

- 2014 -

ACCOUNTING

Tom Hosier

Boyle, Elliott & Pritchard CPAs, LLC

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 Trust

Stacey Neussendorfer

Foster Group

Robert Wellendorf

Executive Solutions

NONPROFIT

Katie Bakhit

Duchesne Academy of the Sacred Heart

Terri Fallin

Stacey Goodman

Omaha Community Foundation

Robert Skrydlak

Creighton University



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Foundation

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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
Lutz & Company, PC

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

C.J. Guenzel

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

Kelli Cavey
Omaha Community Foundation

Amanda Forker
Pansing, Hogan, Ernst & Bachman

James Tews
Koley Jessen, 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



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CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

Program Participants

- 2018 -

ACCOUNTING

Tyler Bartruff

Lutz & Company, PC

Matt Muehling

Deloitte

LAW

Austin Bradley

McGrath North

Trent Reinert

McGill, Gotsdiner, Workman & Lepp, P.C.

Mary Vandenack

Vandenack Weaver LLC

FINANCIAL SERVICES

Sarah Duey

Carson Group Partners Private Trust

Brady Marlow

Harrison Financial Services

Nick Wilwerding

Bridges Trust

NONPROFIT

Camille Allen

University of Nebraska Foundation

Charles Olsen

NorthStar Foundation

Sabrina Weiss

Omaha Performing Arts

DONORS

Todd Clarke

Northstar Financial Services Group

Jeff Gordman

Jeff Gordman Advisory LLC



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Foundation

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CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

Program Participants

- 2019 -

ACCOUNTING

Randy Kathol

Seim Johnson, LLP

LAW

Catherine French

Lamson Dugan & Murray, LLP

Ronald Lee

Mutual of Omaha-Income & Wealth Planning Solutions

Nick Montague

Goosmann Law Firm

FINANCIAL SERVICES

Joe Hefflinger

Lutz Financial

Steve Seline

Walnut Private Equity Partners

Jenny Strako

Bridges Trust

Paul West

Carson Wealth Management

NONPROFIT

Jeff Beckman

The Salvation Army

Diane Crowley

USA Midwest Province of the Society of Jesus

Steven J. Jerina

Omaha Community Foundation



Omaha Community
Foundation

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