

# 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*



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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**

*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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# CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

*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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*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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*Program Participants*

- 2017 -

## ACCOUNTING

**Ralph Dovali**  
*The McMillen Company, 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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*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**

*Carson Wealth Management*

**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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*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*



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# CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

*Program Participants*

- 2020 -

## ACCOUNTING

**Jason Bombeck**

*BKD, LLP*

**Brian Gough**

*Hancock & Dana, PC*

**Deyna Rouse**

*Lutz & Company, PC*

## LAW

**Ben Deaver**

*Pansing, Hogan, Ernst & Bachman*

**Laura Essay**

*Dvorak Law Group, LLC.*

## FINANCIAL SERVICES

**Mike App**

*Bridges Trust*

**John Gessert**

*Union Bank & Trust Company*

## NONPROFIT

**Kyle Cartwright**

*Nebraska Cultural Endowment*

**Tony LaMar**

*Archdiocese of Omaha*

**Lauren Steier Miltenberger**

*Creighton University*

**Juan Padilla**

*Omaha Community Foundation*

## OTHER

**Dan Hamann**

*Spectrum Financial Services*



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