

# CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

*Participant List with Class Designation.*

## ACCOUNTING

Tyler Bartruff, *Lutz & Company, PC* (7)  
Wendy Cooley, *Seim Johnson, LLP* (10)  
Pete Froelicher, *Lutz & Company, PC* (2)  
Andrew Guill, *RSM* (4)  
Tom Hosier, *Berger, Elliott & Pritchard CPAs* (3)  
Mike McDevitt, *BKD* (6)  
Matt Mercer, *Deloitte* (2)  
Janet Osborn, *Hancock & Dana, PC* (5)  
Ken Patry (1)  
Leonard Sommer, *Hancock & Dana, PC* (4)  
Jim Sousley, *Seim Johnson, LLP* (3)  
Larry Tennison (1)  
Andrew Worthington, *Frankel Zacharia LLC* (6)

Jason Bombeck, *BKD, LLP* (9)  
Ralph Dovali, *The McMillen Company, P.C.* (6)  
Brian Gough, *Hancock & Dana, PC* (9)  
Greg Harr, *O'Donnell, Ficenec, Willis & Ferdig LLP* (2)  
Steven Kenney, *Lutz & Company, PC* (4)  
Troy McKinney, *Bland & Associates PC* (5)  
Matt Muehling, *Deloitte* (7)  
Deyna Rouse, *Lutz & Company, PC* (9)  
Jeff Snyder, *Lutz & Company, PC* (1)  
Lisa Strutzel, *Lutz & Company, PC* (5)  
Kim Sucha, *KPMG* (3)  
Randy Kathol, *Seim Johnson, LLP* (8)

## FINANCIAL SERVICES

Jim Ambrose, *Merrill Lynch* (2)  
Bob Bertsch, *Union Bank & Trust Company* (2)  
Dale Christenson, *UBS Financial Services* (4)  
Sara Duey, *Carson Group Partners Private Trust* (7)  
C.J. Guenzel, *First Nebraska Trust Company* (5)  
Jason Hiley, *Hiley Hunt Wealth Management* (1)  
Daniel Kline, *First National Bank* (6)  
Dan Lindstrom, *UBS Financial Services* (2)  
Brady Marlow, *Carson Wealth Management* (7)  
Brian Miles, *Bridges Trust* (4)  
Eryka Morehead, *Collaborative Planning Group* (5)  
Stacie Neussendorfer, *Foster Group* (4)  
Steve Seline, *Walnut Private Equity Partners* (10)  
Jenny Strako, *Bridges Trust* (8)  
Joe Vlock, *Vlock Financial Group* (1)  
Robert Wellendorf, *Executive Solutions* (4)  
Kevin Welsh, *Morgan Stanley* (3)

Mike App, *Bridges Trust* (9)  
Jim Boulay, *Lutz Financial* (5)  
Brandon Dirkschneider, *Insurance Designers* (10)  
John Gessert, *Union Bank & Trust Company* (9)  
Joe Hefflinger, *Lutz Financial* (8)  
James Huerter, *Security National Bank of Omaha* (10)  
Susan Koesters, *D.A. Davidson & Co.* (1)  
Marietta Luellen, *First National Bank* (3)  
Megan McMurry, *Bridges Trust* (6)  
E.J. Militti, *Morgan Stanley* (5)  
Bob Mundy, *Mundy & Associates* (3)  
Joe Reding, *Pinnacle Trust Services* (5)  
James Shoquist, *Northwest Wealth Management Inc.* (10)  
Thomas Sudyka, *Lawson Kroeker Investment* (6)  
Mark Weber, *Legacy Spectrum Advisor, LLC* (1)  
Paul West, *Carson Wealth Management* (8)  
Nick Wilwerding, *Bridges Trust* (7)

## CAP® – Participant List with Class Designation.

### LAW

Austin Bradley, *McGrath North* (7)  
Kelli Cavey, *Omaha Community Foundation* (6)  
Brett Ebert, *Ball, Loudon, Ebert & Brostrom, LLC* (10)  
Ben Deaver, *Pansing, Hogan, Ernst, and Bachman LLP* (9)  
Dan Dittman, *Erickson & Sederstrom* (5)  
Laura Essay, *Dvorak Law Group, LLC* (9)  
Catherine French, *Lamson Dugan and Murray, LLP* (8)  
Amanda Forker, *Pansing, Hogan, Ernst & Bachman* (6)  
Gary Gotsdiner, *McGill, Gotsdiner, Workman & Lepp* (2)  
Adam Grieser, *Fraser Stryker PC LLO* (10)  
Jon Grob, *McGrath North* (5)  
Dan Guinan, *Fraser Stryker PC LLO* (3)  
Brandon Hamm, *Koley Jessen, PC LLO* (3)  
Tom Kelley, *McGrath North* (2)  
Sharon Kresha, *Baird Holm LLP* (1)  
Ronald Lee, *Mutual of Omaha-Income & Wealth Planning Solutions* (8)  
Rob Likes, *Likes Meyerson Hatch LLC* (2)  
Tom Malicki, *Abrahams Kaslow & Cassman LLP* (2)  
Nick Montague, *Goosmann Law Firm* (8)  
Trent Reinert, *McGill, Gotsdiner, Workman & Lepp* (7)  
Andrew Sigerson, *Legacy Design Strategies, P.C., LLO* (10)  
Jesse Sitz, *Baird Holm* (4)  
Nick Taylor, *Fitzgerald, Schorr, Barmettler & Brennan, PC, LLO* (1)  
James Tews, *Koley Jessen, PC LLO* (6)  
Mary Vandennack, *Vandennack Weaver LLC* (7)  
Daniel Waters, *Lamson Dugan & Murray, LLP* (5)  
Mike Weaver, *Vandennack Weaver LLC* (3)  
David Wilson, *Walentine O'Toole* (4)  
Alex Wolf, *Koley Jessen, PC LLO* (5)  
Sean White, *Cline, Williams, Wright, Johnson & Oldfather* (4)

### OTHER

Todd Clarke, *Jacob Partners, LLC* (7)  
Dan Hamann, *Spectrum Financial Services, Inc.* (9)  
Jeff Gordman, *Jeff Gordman Advisory LLC* (7)  
Ron Quinn, *Tenaska* (1)

*CAP® – Participant List with Class Designation.*

**NONPROFIT**

Camille Allen, *University of Nebraska Foundation* (7)  
Katie Bakhit, *Duchesne Academy of the Sacred Heart* (4)  
Jeff Beckman, *The Salvation Army* (8)  
Jeremy Belsky, *Boys Town* (3)  
Kathy Bertolini, *CHI Health* (10)  
Sara Boyd, *VidaNyx* (1)  
Kyle Cartwright, *SEAchange, LTD* (9)  
Karen Cimpl Hotz, *Marian High School* (6)  
Renee Coughlin, *MOSAIC* (6)  
Pat Crisler, *Metropolitan Community College Foundation* (1)  
Diane Crowley, *USA Midwest Province of the Society of Jesus* (8)  
Matt Darling, *Fontenelle Nature Association* (2)  
CK Duryea, *University of Nebraska Foundation* (2)  
Nate Driml, *Mercy High School* (10)  
Howard Epstein, *Jewish Federation of Omaha Foundation* (2)  
Terri Fallin, *Consultant* (4)  
Mike Findley, *Creighton University* (3)  
Linda Garbina, *The Salvation Army* (5)  
John Glenn, *Madonna Rehabilitation Hospital* (5)  
Stacey Goodman, *Omaha Community Foundation* (4)  
Steven Hill, *University of Nebraska Foundation* (5)  
Steven Jerina, *Rollins College* (8)  
Tom Kerfoot, *Children's Hospital & Medical Center Foundation* (6)  
Donna Kush, *Omaha Community Foundation* (10)  
Tony LaMar, *Archdiocese of Omaha* (9)  
Tracy Madden-McMahon, *Methodist Hospital Foundation* (3)  
Lauren Steier Miltenberger, *Bridges Trust* (9)  
Charles Olsen, *NorthStar Foundation* (7)  
Juan Padilla, *Canopy South* (9)  
Emily Prauner, *Fontenelle Nature Association* (10)  
Erin Russell, *Heider Family Foundation* (2)  
Shannon Sands, *Springfield Community Foundation* (6)  
Steve Scholer, *Creighton University* (1)  
Robert Skrydlak, *Creighton University* (4)  
Louri Sullivan (5)  
Michael Thompson, *Boys Town* (10)  
Sabrina Weiss, *Omaha Performing Arts* (7)