



## **Planned Giving Advisory Council**

### **Purpose**

To assist the Kansas City Symphony in growing its planned giving program by serving as an informational resource for donors and staff and advocating on behalf of the Symphony in the professional gift planning community.

### **Member Responsibilities**

- Apprise staff of charitable gift planning innovations, trends and best practices.
- Help refine the process for identifying and cultivating planned giving prospects.
- Find opportunities for staff to speak with industry professionals about the Symphony's mission, programming, impact and future plans.
- Identify other professionals to serve on the PGAC.

### **Member Qualifications**

Experience in the planned giving arena as an attorney, financial advisor, trust officer, CPA, marketing professional or other expert.

### **Time Commitment/Expectations**

Members will serve renewable one-year terms, during which time they will be expected to:

- Attend at least three of four yearly PGAC meetings in person or via conference call.
- Attend and/or participate in one planned giving stewardship or cultivation event.

*Members are not expected to fundraise, although their interest, insight and expertise will be helpful in enhancing the value and the credibility of the planned giving program at the Symphony.*



## Planned Giving Advisory Council Members

**James H. Bernard, Jr.**

Slagle, Bernard & Gorman, P.C.

**Steve Bahr**

Shareholder  
Polsinelli

**Wendy Burgess**

CFO  
RDD Family Office, LLC

**Kelli J. Glynn**

SVP, Market Leader  
U.S. Bank Private Wealth Management  
U.S. Bank

**Bruce R. Hopkins**

Bruce R. Hopkins Law Firm, LLC

**Robert K. Kirkland**

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**Tiffany Owens, CFP®**

Senior Vice President  
Private Client Advisor  
US Trust, Bank of America  
Private Wealth Management

**Abraham Radmanesh**

SVP, Senior Wealth Advisor  
Private Wealth Management  
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**Erik Rome**

Associate  
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**Elizabeth S. Rowe**

Attorney  
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**Joseph R. Sims, CPA**

**Alisha Thomson, J.D.**

Assistant Vice President, Wealth Strategist  
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