

Instructor Bios

Anat Becker, JD

President

Planned Giving Council of Greater Philadelphia

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Anat Becker has over twenty years of planned giving experience, including posts at Saint Joseph's University (Director of Planned Giving), Hadassah (National Director of Planned Giving and Estates), the Jewish Community Foundation of MetroWest, NJ (Executive Director) and the Anti-Defamation League where she started her career in gift planning in 1997.

Anat is currently the president of the Planned Giving Council of Greater Philadelphia and a member of the faculty of the Planned Giving Course. Anat has also presented at NYU's Philanthropy Day.

Anat is a graduate of Yeshiva University's Cardozo School of Law and Pace University.

Daniel Greenspon, CAP®

Philanthropic Consultant

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Dan Greenspon is Founder and CEO of DG Capital Insights, LLC (DGCI), a philanthropic consulting firm focused on donor-advised funds, private foundations, and planned giving technology, administration, marketing, and fundraising projects. Dan has spent more than 12 years in the charitable gift administration marketplace with leading firms like Vanguard Charitable, National Philanthropic Trust, and most recently RenPSG.

Dan's current work includes roles at firms like Charitable Solutions, LLC as Vice President of Strategic Partnerships and Business Development. In this role, Dan helps financial and non-profit institutions, as well as financial and fundraising professionals to unlock more illiquid or complex assets for philanthropic purposes. He also assists institutions with their marketing and messaging around the philanthropic conversation specific to their readiness to respond to their donors questions and situations concerning complex asset donations.

Dan earned two bachelor degrees in both Economics and Urban Planning at the University of Pittsburgh. He also holds a Non-Profit Management Certificate from the University of Pittsburgh and obtained the Chartered Advisor in Philanthropy (CAP) designation from The American College in 2011. He volunteers locally in the Philadelphia region as a member Board of Directors for the Visiting Nurses Association in Abington, PA and the Planned Giving Council of Greater Philadelphia. Dan enjoys the outdoors and hikes, skis, and plays tennis and golf for leisure. Dan resides in Lafayette Hill, PA with his wife and two children.

Lynn Malzone Ierardi, JD

Director of Gift Planning
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Lynn Malzone Ierardi, JD has been in the estate and gift planning field for more than 30 years. She is a leader in the charitable planning community and recently completed a term as 2019 Board Chair of the National Association of Charitable Gift Planners (CGP).

Lynn's book, ***Storytelling: The Secret Sauce of Fundraising Success***, was recently named to Book Authority's 100 Best Fundraising Book of All Time. As a dynamic and highly rated speaker, Lynn has presented at conferences, meetings, and webinars on a variety of charitable planning topics. She is passionate about helping nonprofit organizations to secure significant gifts using the right assets, and the right structures.

She has served as Director of Gift Planning for the University of Pennsylvania since 2005 and as an independent gift planning consultant ([GiftPlanningAdvisor](#)) since 2002. Her experience includes gift planning positions in health and higher education, as Vice President with the Merrill Lynch Center for Philanthropy, and the practice of estate planning and real estate law. Lynn is a graduate of Lycoming College and Fordham University School of Law, and a two-time Proud Penn Parent.

David J. Toll, JD

Senior Associate Vice President
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David J. Toll brings more than 19 years of professional experience in development and fundraising with higher education institutions.

David is currently serving as the Senior Associate Vice President of the Office of Gift Planning at Drexel University, where he is responsible for the development and implementation of university-wide planned giving efforts for Drexel University, Drexel University College of Medicine, Tom Kline School of Law and the Academy of Natural Sciences at Drexel University. He is also a Senior Consultant for Gift Planning Development, LLC.

Widely considered a leader in the field of higher education gift planning, David has the unique ability to articulate very technical gift planning techniques in simple, understandable terms for donors. At Drexel, David provides strategic leadership to aid central major gift staff and encourages the consistent use of “combination gifts” to increase an individual’s giving potential.

David has presented at conferences around the country for organizations such as the Council on the Advancement and Support of Education, and the Philadelphia Chapter of the Association of Fund-Raising Professionals, Planned Giving Council of Greater Philadelphia and the Planned Giving Group of New England. Over the last sixteen years, he has consulted with many groups in developing gift planning programs and structuring complex planned gifts.

David is the past President of the Planned Giving Council of Greater Philadelphia.

Before pursuing a career in higher education advancement, David spent several years practicing law at White and Williams, Patterson and Weir and Fox Rothschild with an emphasis on real-estate, business, tax and estate planning.

David received his bachelor’s degree in Communications and Business from Marietta Collage, a Master of Business Administration from The Martin J. Whitman School of Management at Syracuse University and a Juris Doctorate from the Delaware Law School.

Joe Tumolo, CAP®

CEO

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Joe Tumolo has helped over 75 organizations expand their gift planning programs. He loves structure and process and works with his clients to help them get more intentional and confident around integrating gift planning into all their internal conversations, donor interactions, and reporting. He likes to say, "Gift Planning is everyone's business".

He works with nonprofits of all shapes and sizes all over the country. Joe tests what he teaches through his work as a part time major gift planning officer for Salesian Missions in New Rochelle, NY.

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