

Facilitator Bios:

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, just completing a term as 2019 Board Chair of the National Association of Charitable Gift Planners (CGP). She's also served as a leader for the local CGP councils in New Jersey and Greater Philadelphia.

Lynn's recently published book, *Storytelling: The Secret Sauce of Fundraising Success*, includes a foreword written by esteemed colleague Professor Russell James. As a dynamic and highly rated speaker, Lynn has presented at conferences, meetings, and webinars throughout the country on a variety of charitable planning topics – including storytelling. 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.

David Toll, JD is 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, the Tom Kline School of Law and the Academy of Natural Sciences at Drexel University.

David is also a Senior Consultant with 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 understandable terms for donors.

At Drexel, David provides strategic leadership on the consistent use of “combination gifts” to increase an individual's giving potential. David and his office are tasked with an overall combined gift planning goal of \$20 million annually. The gift planning program under David's direction has raised over \$400 million in complex outright gifts, life-income gifts and realized estate gifts. He is a key member of the senior management team that is currently working on Drexel University's \$750 million comprehensive campaign.