

Bryan Clontz, PhD, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>, CAP<sup>®</sup>, AEP<sup>®</sup>, RICP<sup>®</sup>, CBP, ChSNC<sup>®</sup>



Bryan Clontz is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, actuarial gift annuity risk management consulting, emergency assistance funds, as well as virtual currency and life insurance appraisals/audits. He also serves as Senior Partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in Tuscon, AZ.

Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust - two national donor advised funds focusing on non-cash assets generally and S-corp transactions, respectively. He is also the founder and president of The Emergency Assistance Foundation, Inc. – a global charity that allows employers to create emergency assistance and disaster relief funds for their employees. As of 2020, EAF works with more than 300 employers and 10 million employees.

Finally, Bryan created the National Gift Annuity Foundation, the largest national independent gift annuity platform.

In the decade prior to founding Charitable Solutions, LLC in 2003, he served as the director of planned giving for the United Way of Metropolitan Atlanta, national director of planned giving for Boys & Girls Clubs of America and then as vice president of advancement at The Community Foundation for Greater Atlanta. He received a bachelor's degree in business administration from the College of Charleston in Charleston, SC; a master's degree in risk management and insurance from Georgia State University in Atlanta, GA; master's degree in financial services, as well as a Ph.D. in retirement and financial planning from The American College in of Financial Services in Bryn Mawr, PA. (Dissertation: A Study of the Relationship Between Gift Annuity Solvency and Disparate Statutory Insurance Regulation)

He has earned the following designations: Certified Financial Planner, Chartered Life Underwriter, Chartered Financial Consultant, Chartered Advisor in Philanthropy, Accredited Estate Planner, Retirement Income Certified Professional, Certified Bitcoin Professional and Chartered Special Needs Consultant.

From 2000-2005 he served as a graduate adjunct professor for both personal financial planning and life insurance in the Department of Risk Management and Insurance at Georgia State University. He serves on the Editorial Board of the Planned Giving Design Center (2000-current), the Advisory Board for the American College's Chartered Advisor in Philanthropy designation (2001-current), the American Council on Gift Annuities' Rate Recommendation (2003-2010) and Research Committee (2003-current) and the National Association of Charitable Gift Planners Board, formerly NCPG (2007-2009). He also was a partner in a NAPFA-registered fee-only financial planning firm, Tombs Moody & Clontz from 1995-2003.

He has given more than 2,000 presentations on charitable gift planning and community foundation topics (including the National Committee on Planned Giving Conferences, American Council on Gift Annuities and more than 50 speeches at national community foundation conferences – COF, ADNET, FAOG); been published in an international insurance textbook; and authored a book called *Charitable Gifts of Noncash Assets*, a planned giving manual entitled *Just Add Water*, and a dozen articles in financial services and planned giving journals. Bryan chaired the inaugural statewide *Leave a Legacy Georgia!* Campaign involving more than 400 charities. He has served as an expert witness on charitable gift annuity default and reinsurance involving an Arizona charitable bankruptcy and as a donor advised fund expert witness for a Virginia bankruptcy. He is the co-inventor of a proprietary CGA risk management process (LIRMAS- Life Income Risk Management Analytic Suite) based on an actuarial study he co-authored for the Society of Actuaries on CGA Mortality.

He has been quoted by the Wall Street Journal, New York Times, Kiplingers Personal Finance, Bloomberg Wealth and serves as a guest columnist on charitable tax issues for Forbes.