

Bryan K. Clontz

Ph.D., CFP®, CLU®, ChFC®, CAP®, RICP®, CBP, ChSNC®, CEPA®, AEP® Distinguished

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

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/UBIT transactions respectively. These foundations have raised over \$5 billion in noncash gifts. He is also the founder of The Emergency Assistance Foundation, Inc. – a national charity allowing over 450 employers to create emergency assistance and disaster relief funds for their more than 14 million global employees. He also created the National Gift Annuity Foundation which is 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. In all those positions, he worked with HNW and UHNW individuals and families on complex charitable plans. He also was a partner in a NAPFA-registered fee-only financial planning firm, Tombs Moody & Clontz from 1995-2003.

He received a bachelor's of science 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; a master's degree in financial services as well as a Ph.D. in retirement and financial planning from The American College of Financial Services in Bryn Mawr, PA (Dissertation: Charitable Gift Annuity Solvency Regulation).

He has earned the following designations: CERTIFIED FINANCIAL PLANNER®, Chartered Life Underwriter, Chartered Financial Consultant, Chartered Advisor in Philanthropy, Accredited Estate Planner (Distinguished), Retirement Income Certified Professional, Certified Bitcoin Professional, Certified Exit Planning Advisor 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 Committee (2003-2010) and Research Committee (2003-current) and the National Association of Charitable Gift Planners Board formerly NCPG (2007-2009) and their Leadership Institute (2016-current). In 2022, he was inducted into the National Association of Estate Planning Councils Hall of Fame.

He has given more than 2,000 presentations on charitable gift planning and community foundation topics (including the National Charitable Gift Planner 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 a book *Charitable Gifts of Noncash Assets*; and written more than two dozen articles in financial services and planned giving journals, including a planned giving manual entitled Just Add Water, which has sold more than 2,000 copies. Bryan chaired the inaugural statewide *Leave a Legacy Georgia!* Campaign involving over 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 currently serves as a monthly columnist on charitable tax issues for Forbes.