



# Great Lakes Bay Estate Planning Council

Website: [www.glbecp.org](http://www.glbecp.org)

2024-2025 Officers

President: Chelsea Brown  
Vice-President: Shane Bradley

Sec/Treasurer: Kyle Fahrner  
Past President: Kevin Scorsone



## ***MEETING NOTICE and RESERVATION FORM***

**DATE:** Thursday, April 24, 2025

**TIME:** 12:00 PM – 1:30 PM

**SPEAKERS:** Professionals from across the Great Lakes Bay Region

**TOPIC:** PRACTICALLY SPEAKING, HOW GIFTS & BEQUESTS REALLY WORK

**VENUE:** Midland Country Club, 1120 W. St. Andrews Road, Midland, MI 48640

**SATELLITE VENUE:** Isabella Bank, 139 E. Broadway, Mt. Pleasant, MI 48858

**TEAMS OPTION:** This meeting will also be available on Microsoft TEAMS  
*A web conference link will be emailed prior to the meeting*

The Great Lakes Bay Region is fortunate to have a culture of collaboration, creativity and philanthropy among our corporate, foundation, and individual philanthropists. To highlight this work and provide an opportunity to engage with some of our area's philanthropic leaders, the [GLBEP](http://www.glbecp.org), Lamson Humphreys PLC, the Midland Area Community Foundation, Tri-Star Trust Bank, and Yeo & Yeo, CPAs & Advisors have joined together to collaboratively host a Great Lakes Bay Regional Philanthropy Panel Discussion.

The panel will provide a broad overview of fund development and discuss how philanthropy has changed over time. They will provide insights on how to talk about philanthropy and the role professionals working in the legal and financial space play to promote philanthropic giving for clients who are inclined to give charitably.

Please join us to hear from professionals from across the region regarding current funding trends and their plans to address the obstacles and opportunities that come from this uniquely challenging time. There will be time reserved for questions from attendees.

### **ANDREW BETHUNE, CFRE**



Andrew Bethune serves as a Business Development Officer and Vice President at Tri-Star Trust Bank. Andy recently authored his first book, *'Relationship-First Fundraising: Mastering Fundraising Through Relationships and Trust'*. Prior to joining Tri-Star, he was the Executive Director of the Saginaw Valley State University Foundation, which also happens to be his alma mater. In Andy's 18 years with the foundation, he oversaw the private fundraising initiative to construct the Carmona College of Business, raising nearly \$16 million. Andy received his Bachelor of Business Administration from Saginaw Valley State University and his Certified Fundraising Manager from Indiana University. As he loves being involved in his work, he is also highly involved in his community.

Andy is the Endowment Chair for the First United Methodist Church of Saginaw, Chair of the Men's Golf Fellowship – Saginaw, and Chair of Mridha International Institute for Peace and Happiness.

## JIM BELLOR, CPA

Jim Bellor, CPA, is a Senior Manager in Yeo & Yeo's Midland office. He is a member of the firm's Estate & Trust Services Group and Tax Services Group. He specializes in tax planning and preparation of individual, corporate, estate and trust, and nonprofit tax returns. Jim is a member of the Midland Area Chamber of Commerce and the Midland Young Professionals. He joined Yeo & Yeo in 2020 and has more than eight years of accounting experience.



## JOHN D.L. HUMPHREYS, JD

John D.L. Humphreys is the principal attorney at Lamson Humphreys, PLC, a firm dating back four generations to 1882. John graduated from Alma College and the Detroit College of Law (now MSU). He has been practicing primarily in the areas of estate planning/probate, real estate, and business law for over 35 years. John serves as a trustee and officer of two private foundations, The Wickson-Link and Nickless Foundations, and of the Turner Memorial Trust. His community involvement includes having served as Chair of the SVSU Foundation, Saginaw Promise, Saginaw County Bar Association and Mid-Michigan Children's Museum. He spent two years as a Saginaw City Council member and continues to work on city commissions. His practice and personal life have brought him years of experience in working for and with nonprofit organizations.



## SHARON MORTENSEN



Sharon Mortensen serves as the President and CEO for the Midland Area Community Foundation. She believes the best things happen when we work together to positively impact and transform our community so all people can thrive. Sharon has worked in the nonprofit world for over 30 years. She joined the team at the Midland Area Community Foundation in 2012. Over the past decade, the Foundation has established the career and college access network, implemented impact investing, started "Ready for School" to provide access to early childcare and education, as well as joining community-wide efforts around internet connectivity, infrastructure to prevent flooding, and expansion of housing. Prior to her work at the Community Foundation, she led Shelterhouse/the Council on Domestic Violence and

Sexual Assault for 8 years. Her work in the nonprofit sector has included serving as program coordinator, group therapist, community treatment therapist and parenting and community educator. Sharon has a master's degree in counseling and a bachelor's degree in communications. She has extensive nonprofit and community involvement through service on boards, commissions, collaborative groups and service clubs.

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**PLEASE NOTE:** *The PowerPoint, if any, provided by the panel will be emailed to you before the meeting. Copies will be available in reduced size for those members attending in person in order to follow along with the speaker. All PowerPoints will also be added to our Document Library on the website before the meeting and can be accessed there at any time.*

This meeting will also be available on the Microsoft Teams platform, and a link will be emailed to members early that week. If you have not received notice of the link by the day before the meeting, please contact us.



# Great Lakes Bay Estate Planning Council

Website: [www.glbepec.org](http://www.glbepec.org)  
2024-2025 Officers

President: Chelsea Brown  
Vice-President: Shane Bradley

Sec./Treasurer: Kyle Fahrner  
Past President: Kevin Scorsone



Affiliated with NAEPC

Your registration is required if you plan to attend this meeting in person at either venue. A buffet lunch will be served at noon. You may register by sending an email to [admin@glbepec.org](mailto:admin@glbepec.org) or by mailing the registration form on the next page to: GLBEPC, P.O. Box 347, Freeland, MI 48623. Please RSVP by April 18, 2025.

**DATE:** Thursday, April 24, 2025

**TIME:** 12:00 PM – 1:30 PM

**SPEAKERS:** Professionals from across the Great Lakes Bay Region

**TOPIC:** PRACTICALLY SPEAKING, HOW GIFTS & BEQUESTS REALLY WORK

**VENUE:** Midland Country Club, 1120 W. St. Andrews Road, Midland, MI 48640

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**MEMBERS:** \_\_\_\_\_ Please reserve a place for me at the meeting (no charge).

**NAME OF MEMBER:** \_\_\_\_\_

**LOCATION:** ☐ Midland ☐ Mt. Pleasant

**GUESTS:** (PLEASE NOTE: This meeting is available to all guests for a \$25 fee that includes lunch. The **first-time guest attendance** at no extra charge is **no longer available**.)

Please reserve places for \_\_\_\_\_ guest(s) at the meeting.

**GUEST(S)\*:**

Name	_____	Name	_____
Company	_____	Company	_____
Address	_____	Address	_____
	_____		_____
Phone	_____	Phone	_____
Email:	_____	Email:	_____

\*Use additional page for guest information if necessary.

**TOTAL ENCLOSED \$** \_\_\_\_\_

Please make checks payable to: **GREAT LAKES BAY ESTATE PLANNING COUNCIL (GLBEPC).**

P.O. Box 347  
Freeland, MI 48623  
Admin Phone: 989-284-3934