

PROFESSIONAL
BUSINESS AND PHILANTHROPIC
LEADERSHIP CREDENTIALS

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SUMMARY

As one of the foremost leaders in Philanthropic Planning in the country, Gregory A Schupra has educated and assisted thousands of high-net worth individuals, families and advisors in creating legacies leaving more than \$1 billion of wealth to charity.

Known for his innovation as a “National Philanthropic Entrepreneur,” Mr. Schupra brings an uncommon and practical perspective to his work as a gift-planning professional by ensuring that donor philanthropic values, visions, and goals align with their giving methods.

This expertise lends itself nicely in assisting business owners with their philanthropic planning incorporated in business sale transactions as he has done for many years.

Mr. Schupra has extensive business and prudent investor experience through creating, managing and growing a \$1.2 billion charitable trust company within one of the top 30 financial institutions in the U.S. He is also a founder and officer of several for-profit and nonprofit companies and charitable foundations.

Mr. Schupra authored the highly-acclaimed book, “An Unexpected Legacy: Strategies of Generosity,” which is considered by many as one of the premier, hands-on textbooks in Philanthropy and Charitable giving and organizational principles.

Because of his unique background working in both the nonprofit and for-profit sectors, he is often quoted by media sources on philanthropic issues and is frequently asked to present at professional advisor and high-net worth donor education meetings, seminars, conferences, and workshops throughout the United States.

CAREER HIGHLIGHTS

- Philanthropic Planning and Management – Nonprofit and For-Profit Experience
- Higher Education Fund Development Leadership
 - Higher Education Governance – Past Chair, Board of Trustees, Spring Arbor University
- Community Foundations
 - Created 4 community foundations including donor advisor fund programs

- One of first community foundation development professionals in country; 1st in Michigan
 - Leader of the Fundraising Academy for Van Dusen Endowment Challenge for The Kresge Foundation – 39 charitable organizations; \$52 million endowment
- Past Chair, Community Foundation Advancement Network for Council on Foundations, Washington, D.C.
- Oversight and administration of more than 1,000 Charitable Trusts and Foundations
 - Annual grant making over \$50 million
- Founder, Planned Giving Roundtable of Southeast Michigan
- Served on national Board of Directors, Partnership for Philanthropic Planning (formerly NCPG)
- Founded and managed, Charitable Trust Division for a top 30 financial institution
 - Charitable assets increased by more than \$1 billion
 - Increased annual revenue from \$2 million to \$12 million
 - Comprehensive services for Charitable Remainder and Lead Trusts, Pooled Income Fund Trusts, Charitable Gift Annuity Programs, Endowment Funds, Private Foundations and Donor Advisor Funds
 - Provided Philanthropic Planning for clients of 14 investment and financial institutions nationally including Morgan Stanley, UBS, RBC Wealth Management and others
- Created a Mutual Fund for a private National Prepaid Tuition Program
- Created a \$40 million Charitable Common Trust Fund
- Created Comprehensive Charitable Gift Annuity Management Services with more than 10,000 annuitants and over \$500 million in assets
- National Presenter on Philanthropic Education
 - Partnership for Philanthropic Planning National Conferences – TX, CO, CA, MN
 - Regional Planned Giving Council Conferences – CA, MI, MN
 - Local Planned Giving Council Conferences – MI, OH, FL, TX, CA, ID
 - Local Financial and Estate Planning Council Meetings – FL, CA, MI
 - Donor Education Programs for Nonprofit Organizations -- NY, TX, CA, WA, MD, AZ, ID, CO, FL, MI
- Author, “An Unexpected Legacy: Strategies of Generosity,” Print and eBook, 8 February 2015

COMMUNITY LEADERSHIP

- Trust Adviser, Trustee Services Group, Colorado Springs, Colorado
- Team Leader, Gift Planning Strategies, MortarStone Charitable, Reno, Nevada
- Member, Board of Directors and Corporate Secretary, Tri-Star Steel, Inc., Detroit, Michigan
- Founding Member and Manager, Spring Arbor Group LLC, Franklin, Michigan
- Founding Member and Partner, Philanthropy Design LLC, Birmingham, Michigan
- Member, Board of Directors, Fountain of Life Foundation, Nairobi, Kenya
- Member, Board of Directors, Stewardship Counsel Foundation, Colorado Springs, CO
- Member, Board of Directors, Family Care Network, Livonia, Michigan
- Member, Board of Directors, Roots Montessori School, Plymouth, Michigan
- Member, Board of Directors, ACT 3 Ministries, Kokomo, Indiana

- Member, Consulting Services Network, Council of Michigan Foundations, Grand Haven, Michigan
- Trustee, Warren and Beverly Boos Charitable Trust, Pontiac, Michigan
- Past Chair, Board of Trustees, Spring Arbor University, Spring Arbor, Michigan
- Past Chair, Community Foundation Advancement Network, Council on Foundations
- Past Member, Board of Directors, Canton Community Foundation, Canton, Michigan
- Past Member, Board of Directors, National Association of Charitable Gift Planning, Indianapolis, Indiana
- Past Member and Founder, Board of Directors, Planned Giving Roundtable of Southeast Michigan
- Past Member, Governing Board, Trinity Presbyterian Church, Plymouth, Michigan
- Involved in the Rescue and Care of Orphans
 - Ethiopia (19 Children)
 - Kenya (40 Children)