Paul Caspersen, CFP®,MS, AEP

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Paul Caspersen brings complex financial thinking to the charitable planning field. As a Certified Financial Planner, Paul has 27 years of financial, estate, and charitable planning experience. Between 2012-2022, he served as Assistant Vice President and Sr. Philanthropic Advisor at the University of Florida, where his Gift Planning team closed $1.25 billion (of the Campaigns $4 billion total) in deferred gifts and outright gifts of complex assets. Prior to his position at the University of Florida, he led the Gift Planning program at Iowa State University. Before specializing in planned giving, Paul spent a decade working in financial services.

Paul is the founder of Planned Giving Interactive (PGI), a charitable planning software & consulting organization. PGI is an affiliate organization to Charitable Solutions LLC, the largest national consulting firm that provides charities with risk management solutions for non-cash donations and charitable gift annuities.

He is also a national board member of The National Association of Estate Planners & Councils (NAEPC), which has over 270-member estate planning councils and provides services to their estimated 30,000 individual members.

In 2011 Caspersen published the book "Direction Memo: How to Write a Letter of Instructions for Your Estate Plan," and is regularly published in peer reviewed journals, such as Trusts & Estates.

Caspersen graduated with honors from the College for Financial Planning, in Denver, CO with a master's in financial planning & taxation and undergraduate degree from the University of Northern Iowa in Business Communications.

When not working Paul enjoys marathon training, cooking, golfing, and spending time with his wife Dana and two sons, Gabe, and Garner.

PUBLICATIONS

- Published *"Direction Memo™: How to Write a Letter of Instructions for Your Estate Plan."* Copyright © 2011 Paul M. Caspersen, Outskirts Press, Inc. ISBN: 978-1-4327-8072-2
- *"QTIPs and Testamentary CRTs: Important tools for accomplishing both charitable and non-charitable objectives."* Trust and Estates October 2015
- *"CGAs: A Surrogate for Fixed Income During Retirement"* Trust and Estates December 2016
- *"Ten Planned Giving Concepts for Charitable Baby Boomers"* Trust and Estates October 2019

PRESENTATIONS

- *"Your Retirement Income Options"* to various audiences of faculty & staff while at TIAA-CREF
- *"Current Tools for Calculating Charitable Gifts"* Annual Professional Advisors Conference at Iowa State University-September 2009
- *"Influencing your Centers of Influence: How to Yield Positive Results from Professional Advisors"* Mid-Iowa Planned Giving Conference-October 2010
- *"Provide & Protect" Organizing Your Estate Plan* Seminar (Ames, IA)- October 2011
- *"Cultivating Deferred and Blended Gifts: Practical Steps to Incorporate Planned Giving Into Cultivation Strategies*" (CASE III conference in Orlando, FL February 15-18, 2015) District 3 Faculty Stars Ranking
- *"Here's what I was thinking when I said "Health, Education, Maintenance and Support:"* The Effectiveness of a "Direction Memo" in Purposeful Trusts and other Estate Planning. Tuesday, March 31st 2015 Purposeful Planning Institute Webinar
- *"Blended Gifts: Big Ideas to Maximize Every Donor's Potential"*. The Association for Healthcare Philanthropy (AHP) Big Ideas Conference in Austin, TX June 29th 2015
- *"Planned Giving 2030: A Philanthropic Solution for Baby Boomers."* Invited to present at the National Partnership for Philanthropic Planning Conference, October 2016. Dallas, TX
- *"Top 3 Ways to Position Life Insurance for Charitable Planning."* National Association of Insurance and Financial Advisors-Florida, the premier professional association in Florida. Orlando, Florida June 17, 2017.