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## ABOUT

# PAUL CASPERSEN MS, CFP®, CAP®, AEP®

Paul has nearly 30 years of expertise in financial, estate, and charitable planning in his role as the Wallace Chair of Learning and Professionalism in Philanthropy at The American College of Financial Services, where he serves as Assistant Professor. In this capacity, he shapes the curriculum and strategic vision for the Chartered Advisor in Philanthropy® (CAP®) program, preparing the next generation of philanthropic advisors. Prior to joining The American College, Paul served as Assistant Vice President and Senior Philanthropic Advisor at the University of Florida from 2012 to 2022. During his tenure, he led a multidisciplinary gift planning team that secured \$1.25 billion in deferred and outright gifts as part of the university's historic \$4 billion fundraising campaign.

Additionally, as the Founder and President of Planned Giving Interactive, LLC (PGI) an A.I. software and advisory firm, Paul developed an industry-leading suite of AI-powered research and document-drafting tools for planned giving. Paul is also Vice President and advisor at Charitable Solutions, LLC, a national consulting firm that supports charities in accepting complex charitable gifts and developing charitable trusts. In 2011, Paul authored *Direction Memo™: How to Write a Letter of Instructions for Your Estate Plan*. His thought leadership also appears in peer-reviewed journals, including *Trusts & Estates*, where his articles explore topics such as testamentary CRTs, charitable gift annuities, and post-SECURE Act charitable planning strategies.

## EDUCATION

Paul holds a Master's in Financial Planning & Taxation from the College for Financial Planning (Denver, CO), where he graduated with honors, and a B.A. in Business Communications from the University of Northern Iowa.

## PUBLICATIONS

*"Navigating the Post-SECURE Act Landscape: Optimizing Beneficiary and Charitable Outcomes with Testamentary Charitable Remainder Trusts"* *Trust and Estates* October 2024

*"Ten Planned Giving Concepts for Charitable Baby Boomers"* *Trust and Estates* October 2019

*"CGAs: A Surrogate for Fixed Income During Retirement"* *Trust and Estates* December 2016

*"QTIPs and Testamentary CRTs: Important Tools for Accomplishing Both Charitable and Non-charitable Objectives"* *Trust and Estates* October 2015

*"Direction Memo™: How to Write a Letter of Instructions for Your Estate Plan."*

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## PRESENTATIONS

Florida Tax Institute Conference, 2025

National Charitable Gift Planners Conference, 2024

Since 2020, Paul has spoken at over 50 Estate Planning Councils, including Chicago-IL, Jacksonville-FL, Santa Rosa-CA, Eugene-OR, etc.

Paul has spoken at a number of Planned Giving Council chapters on a variety of technical topics, including but not limited to the following:

- *Leveraging AI in Charitable Gift Planning for 2025 and Beyond*
- *The Charitable Planning Guide to the SECURE ACT 1.0 & 2.0*
- *Top Three Ways to Use Life Insurance in Charitable Planning*
- *The "ABC's" of CRTs*
- *Creative Charitable Planning with Non-Cash Assets: A Case Study Approach*
- *Supporting Organizations: Imagine Donor Advised Funds on Steroids*
- *Creative Charitable Gift Annuity Marketing Ideas*
- *Direction Memo: The Importance of a Letter of Instructions in Modern Estate Planning*
- *Recent Cases in Charitable Gifts of Complex Assets*