

# PLANNED GIVING ADVISORY COUNCIL

Annual Report | Fiscal Year 2022





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#### Joe Benedetti

**Owner** 4 Oaks Wealth Management, LLC

William Deitch Founder The Estate Planning Law Group

# Amber Drew

Partner Clingen, Callow & McClean LLC

> Jack Dunk Private Wealth Advisor Ameriprise Financial

#### **Marifran Georgis**

VP & Trust Officer Associated Bank

#### Thomas Hentschel Financial Advisor

Waddell & Reed

# Joan Kelley

Private Wealth Advisor Ameriprise Financial

### **Kathleen Krochock**

First Vice President & Senior Trust Officer The State Bank of Geneva

#### **Ted Kuczek**

Founder Kuczek & Associates

#### **Brian Lampsa**

Senior Vice President of Investments True North Retirement Partners of Raymond James

#### **Raymond Odom**

Senior Vice President Northern Trust Company

#### John Schmidt

Managing Director & Senior Trust Advisor CIBC Bank USA

# **Scott Seraphin**

Attorney & Shareholder Seraphin & Rogers, Ltd.

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