# Paul Caspersen, CFP,® MS

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Paul Caspersen, Assistant Vice President and Sr. Philanthropic Advisor at the University of Florida, brings complex financial thinking to the charitable planning field. As a Certified Financial Planner, Paul has 23 years of financial, estate, and charitable planning experience. Paul and his office have been tasked with an overall combined Gift Planning goal over $150 Million annually in deferred, real estate, and other complex gifts. He is a key member of the Senior Management Team that is directing UF's next comprehensive campaign.

Paul was the Executive Director in the Office of Gift Planning at the Iowa State University Foundation from 2009 to 2013. Prior to that, Paul was a Wealth Management Advisor with TIAA-CREF and served as the Firm's Managing Principal for Iowa. Mr. Caspersen earned a Bachelor's degree from the University of Northern Iowa and a Master's degree in Financial Planning from the College for Financial Planning in Denver, CO. Paul is author of the financial planning book entitled, "*Direction Memo: How to Write a Letter of Instructions for Your Estate Plan*."

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## 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.