Professional Advisory Council 2023 Roster

Provided by the Jewish Federation of Greater Nashville

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Jewish Federation
of Greater Nashville

Initially, the Professional Advisory Council (PAC) was created to support the LIFE & LEGACY™ program of after-lifetime giving. PAC members volunteered their time to answer questions from donors about the options for formalizing their legacy gifts to Jewish organizations in Nashville. The PAC held seminars at which PAC members provided educational programs and offered general advice to attendees.

PAC members are available to assist local Jewish organizations seeking advice on endowment programs; and individual members of the community needing professional assistance in the PAC member's area of expertise. In these instances, the organization or individual should negotiate directly with the PAC member regarding the scope of services and fees, as these relationships are outside the scope of PAC activities.

PAC members are a diverse group of accountants, attorneys (elder law, wills and estate planning, tax law), certified financial planners, insurance agents or brokers (life and health products, Medicare, Social Security, long-term care), investment advisors, and wealth management advisors.

Membership in the PAC is open to professionals with a minimum of three years of experience in their area of expertise. For more information about the PAC and the criteria for joining, please contact Norma Shirk, Legacy Coordinator, at 615-354-1678 or norma@jewishnashville.org.

The information provided in this roster is for informational purposes only and is not intended as legal or tax advice. A professional advisor should be consulted to discuss your specific situation and options. PAC members are not endorsed by the Jewish Federation of Greater Nashville with regard to a specific expertise in a particular area of law, tax planning, or estate planning.

John Dodd

Private Wealth Advisor
Ronald Blue Trust

John Dodd is a Sr. Private Wealth Advisor for the Private Wealth division of Ronald Blue Trust and serves his clients out of the branch office in Nashville, Tennessee. As an experienced wealth advisor to individuals, families, and businesses, John uses his objective perspective to help clients make wise financial decisions, live generously, and leave a lasting legacy. His goal is to help those he serves have the clarity and confidence to focus on the things that matter most to them. John and his team integrate financial planning, investment management, and trust services into financial plans tailored to his clients' needs. Prior to joining the company, John worked for Arthur Andersen & Co. as a Tax Accountant serving individuals, corporations, and partnerships. John also worked in the banking industry in mergers and acquisitions, financial analysis, and lending.

John earned his B.S. in Accounting from the University of Mississippi and his Master of Taxation at Georgia State University. He is a CERTIFIED FINANCIAL PLANNER™ certificant, a Chartered Retirement Planning Counselor, an Accredited Asset Management Specialist, an Accredited Wealth Management Advisor, and a Chartered Mutual Fund Consultant. John is a popular financial teacher and seminar speaker, earning an "excellent" rating by the America Institute of Banking, as well as being a featured speaker at the Federal Reserve. John has appeared in Fortune magazine, Sound Mind Investing newsletter and authored a book entitled "Rx for a Medical Marriage: A Guide to Harmony" (based, in part, on his marriage to a doctor and having been reared in a medical family). He has spoken on Christian Radio and been a featured speaker for Focus on the Family and Christian Medical and Dental Society conferences.

His past and present community involvement includes adjunct professor of accounting at Dekalb College, past President of InfoAdvantage Toastmasters, and Chairman of the Board of the Friends of the Susan Gray School at Vanderbilt University. John is active on the Board of the Brentwood YMCA, Leadership Brentwood, and Cool Springs Rotary. John and his wife, Kathleen, live in Brentwood and have two daughters.

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Adam Dretler

Principal
Asset Management
Diversified Trust

Adam is a Principal at Diversified Trust, a South-East based Trust Company and Investment firm where he is responsible for serving both institutions and families. Prior to joining Diversified Trust, Adam worked at Ziff Brothers Investments, a multi-billion-dollar, single-family office based in New York City. Adam invested in a wide range of global macro products for the family including currencies, equities, ETFs, interest rates, futures, and commodities. Prior to his time at Ziff Brothers, Adam worked as an equity trader for Deutsche Bank where he helped build and develop Deutsche Bank's Small and Mid-Cap trading platform. Adam started his investment career as a broker on the floor of the New York Stock Exchange.

Adam graduated from Duke University with a Bachelor of Arts degree. During his time at Duke, he was captain of the nationally ranked lacrosse team. Adam is a board member of the Jewish Federation of Middle Tennessee, where he also serves as Chairman of the investment committee.

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William “Billy” H. Eskind

Managing Director
Financial Advisor
Wells Fargo Advisors

William, (Billy) works closely with his clients to make good, sound, strategic financial decisions. Billy values the relationships he has established with his clients and cites empathic listening and concern for their well-being as the cornerstones to developing life-long relationships. With over 26 years of experience as a Financial Advisor, Billy is dedicated to helping individuals meet their financial needs by developing investment plans that are compatible with their long-term goals and risk tolerance. Billy’s extensive experience combined with his educational background and relationship-centric focus, enable him to help his clients structure custom portfolios designed for their specific financial goals.

Billy earned Bachelor’s degrees in Economics and Political Science from Duke University and a Master’s of Business Administration degree from Harvard. Billy has the honor of being named one of Barron’s Top Financial Advisors three years in a row (Top 1,000 2013, Top 1,200 2014 and 2015). He was also named one of Financial Times’ Top 400 Advisors for 2014. Billy is currently a distinguished member of Wells Fargo’s Premier Advisors, Chairman’s Council.

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David Heller

Attorney
Martin Heller Potempa & Sheppard, PLLC

David’s practice focuses on family wealth preservation, which includes estate planning, estate tax planning, and asset protection planning. David helps clients and their families create plans to protect the family wealth from “outsiders” such as creditors, ex-spouses and divorcing in-laws. Additionally, David advises clients on reducing their potential estate tax liability. Many of David’s plans combine asset protection planning, estate tax savings and planning for the family’s future generation. David also advises families with business succession issues, pre-marital agreements and charitable planning. As an extension of his estate planning practice, David also handles the probate and administration of estates and trusts after an individual’s death and represents beneficiaries when controversies arise between family members. David can also help with conservatorship and guardian issues if a person becomes incapacitated.

David has been awarded the top “AV” rating by Martindale-Hubbell. David is often a featured speaker at numerous seminars and teaches estate planning at various CLE courses. David graduated from Carnegie-Mellon University in 1984 with a double major in Information Systems and Math. He received his J.D. with cum laude distinction from Widener University School of Law in 1994 and an LL.M. Masters in Tax Law, with honors, from Georgetown University in 1995. David serves on several boards and committees for non-profit organizations throughout the middle Tennessee area.

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Mindy S. Hirt

Senior Vice President
Wealth Advisor
Argent Trust

Mindy joined Argent Trust of Tennessee in 2012 with the opening of the company's new Nashville location. As a wealth advisor with Argent, she serves select high net worth families with trust, investment, foundation, estate and family office services. Mindy earned her B.S. at the University of Wisconsin-Madison and her MBA from Vanderbilt University. Prior to joining Argent, Mindy worked with Regions Morgan Keegan Trust for 10 years in the Private Family Services group focused on providing holistic financial services. She previously had management experience in customer service with Ford Motor Company, the Metropolitan Museum of Art, and a regional CPA firm.

Her main focus is multi-generational family governance and dynamics. Her work has been recognized in a number of publications including Private Wealth Magazine, WSJ MarketWatch and Research Magazine. Mindy was a winner of the Nashville Business Journal's "Power Leaders in Finance" in 2017, "Women of Influence" Award in 2016 and the Young Leadership Award from the Jewish Federation of Greater Nashville in 2014. She served as co-chair of the Grants Committee of the Jewish Federation. She has previously been active on the Financial Planning Association board and the Imagination Library Advisory Committee. Mindy has also served as the past chair of The Temple's Investment Committee and as a past board member of the Partnership for Philanthropic Planning of Nashville, whose mission is to inspire and educate individuals on the many ways they can make charitable planned gifts. She lives in Nashville with her husband, Kenny, and children, Jonah and Asher.

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Lee Kraft

Accountant
KraftCPAs PLLC

Lee Kraft has more than 50 years of experience in public accounting with KraftCPAs. He received his B.A., cum laude, in Psychology with a minor in Accounting from Case Western Reserve University and his MBA, with distinction, from the University of Michigan Graduate School Of Business Administration. He is a Certified Public Accountant as well as an Investment Advisor Representative. He retired from membership in the firm in 2015 and now serves in an "of counsel" role on certain accounting, tax and consulting engagements. He also remains actively involved with the firm's wealth management affiliate, Kraft Asset Management, LLC. Over the years he has worked with clients in a variety of industries including, but not limited to, professional sports organizations, retail businesses, automotive dealers, scrap metal dealers, entertainers, manufacturers, wholesale distributors, service organizations and not-for-profit entities.

Lee has consulted with numerous individuals and families on a variety of financial planning engagements, including estate and gift, philanthropic based giving and income tax planning. He has held several officer and board member positions with various organizations including the Tennessee Society of Certified Public Accountants, the Sertoma Club of Nashville and the Bernard Family Foundation. He also assumed leadership roles for the Legal Aid Society, Jewish Federation of Greater Nashville, Israel Bond Board of Governors, and the University of Michigan Alumni Association. He was named as a Power Leader in Accounting by the Nashville Business Journal in 2011, 2012, and 2013.

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Michael Levine

Wealth Manager
Levine Group, LLC

Mike attended the University of Alabama and graduated from Georgia State University with a degree in Insurance and Finance. He has been in the financial services business since 1987 and is a Top of the Table member of the Million Dollar Round Table. He has been a featured speaker at many professional and business seminars. His specialty is retirement income planning. Mike holds the following professional designations: Accredited Investment Fiduciary, Chartered Life Underwriter, and Chartered Financial Consultant.

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Ralph Levy

Attorney
Dickinson Wright

Ralph Levy is a senior attorney in the Healthcare practice at Dickinson Wright. He assists and advises entrepreneurs and owners of closely-held businesses in operationalizing their business plans, including estate planning, business succession and tax planning issues thereof. Ralph has over 40 years of experience in counseling clients in the Healthcare arena. He earned his B.A. from Colgate University, his J.D. from Vanderbilt University Law School and his LL.M. in Taxation from New York University Law School. He has served as General Counsel for a national health care services provider and manufacturer of medical equipment where he gained critical operating experience and an appreciation of the need for businesses to manage their legal matters in an efficient but proactive manner. He leverages this valuable knowledge by assisting clients in establishing, operating, and expanding their businesses.

Ralph also has significant experience advising boards of directors, compliance committees and senior management in connection with internal investigations and compliance related matters. His areas of practice include Corporate, Corporate Governance, Emerging Businesses, Estate Planning and Administration, Health Care, Heath Care Fraud and Abuse, Health Care Providers and Suppliers, Mergers and Acquisitions, Taxation, and Tax Controversy.

His professional involvements include the Nashville Bar Association, Tennessee Bar Association, American Health Lawyers Association and the Middle Tennessee Estate Planning Council. He served as President of Congregation Ohabai Sholom (The Temple) and presently serves on the board and as counsel to the Tennessee Latin Chamber of Commerce.

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Andrew May

President and Chief Financial Officer
Truxton Trust

Andrew May serves as President and Chief Financial Officer for Truxton Trust. He became President in 2016 and Chief Financial Officer in 2010. Prior to that, he also served as Director for Truxton Trust. Previously, Mr. May was a Managing Director at Jefferies, a New York-headquartered securities firm, Partner and Director of Equity Research at J.C. Bradford and Company, and Senior Vice President, Equity Research at Equitable Securities.

Mr. May holds a Bachelor of Arts from Yale University, cum laude, and a Master of Business Administration, with distinction, from Harvard Business School. He was an infantry officer in the United States Marine Corps, receiving the Combat Action Ribbon for service in Beirut in 1983.

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Harry Perret

Owner
The Oak Tree Advisors

Harry Perret specializes in all things Medicare. He works to simplify the Medicare process while eliminating gaps in coverage and minimizing financial responsibility. Harry's clients often call him, "The Medicare Man" in recognition of his passion and expertise.

Harry was the 2019 Rotarian of the Year with the William (Bill) Warner Award with the Green Hills Rotary.

Having access to all the Medicare plans available in Tennessee, he is able to design the best coverage for his client's needs. His expertise is often sought out by local organizations and senior housing residences for speaking engagements. He is an active volunteer with Meals on Wheels and St Luke's Community House.

As the owner of The Oak Tree Advisors his focus is helping older residents navigate hundreds of federal and state programs that potentially offer resources to vulnerable seniors. His work encompasses assistance with the initial application for Medicare through to the implementation of the plans with continuing customer service. His objective is to enable clients to access the highest quality health care while minimizing their financial risks. His greatest pleasure is to work with vulnerable populations that face the greatest health and financial challenges.

- Navigating the Medicare Maze
- What are my choices with Medicare?
- What are the fees with Medicare?
- Are there penalties if I do not take Medicare?
- Can I go out of state for healthcare?
- Is dental included with Medicare?
- How can I lower my prescription costs?
- How can I get Medicare Extra Help?
- How do I sign up for Medicaid?

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Eva Pulley

Senior Manager, Tax Services
KraftCPAs PLLC

Eva J. Pulley, CPA, CSEP, is a senior manager in the tax services department of KraftCPAs. With 38 years of public accounting experience, Eva specializes in estate and trust planning, taxation and administration. Eva joined KraftCPAs in 2016 and brought with her a practice that provides services for high income and high net worth clients. She works with numerous estate and trust attorneys and investment managers to plan for the preservation, increase and transfer of family wealth.

Eva earned a Bachelor of Business Administration degree from Austin Peay State University. Eva completed the estate planning program offered by the National Institute for Excellence in Professional Education, LLC and was awarded a Specialist in Estate Planning Certification in June of 2000. She continues to attend and participate in education programs to maintain a current understanding of the law as changes are made that relate to income taxation and the taxation of the transfer of wealth. Eva is a member of the American Institute of Certified Public Accountants, Tennessee Society of Certified Public Accountants and the Middle Tennessee Estate Planning Council.

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Howard Safer

Vice Chairman
Argent Trust

Howard joined Argent Trust Company in April 2012 as its Chief Executive Officer. Today as Vice Chairman, he serves families providing trust, investment, estate and family office services. Howard has more than four decades of experience. He received his BA in Economics at Vanderbilt University and his MBA from Tulane University. He is a Certified Public Accountant. Prior to joining Argent, he served as President of a 900 million trust company, the Managing Partner for a 90 person CPA and consulting firm, a Chief Financial Officer for a substantial private company and a Controller for a NYSE public company.

In 2022 Nashville Post named Howard as a Leader in Charge (Finance) and he received the Chesed Award from Jewish Family Service for his service to the Nashville community. Research Magazine honored Howard as one of five advisors nationwide inducted in the 2012 Hall of Fame. The October 2007 issue of Worth magazine named Howard as one of “The Top 100 Wealth Advisors”. JK Lasser’s New Rules for Estate and Tax Planning recognized Howard as a “Top Professional Advisor” in 2002. Howard has been included numerous times in Worth’s Best Financial Advisor listings.

In 1998, he was presented “The Outstanding CPA in Business and Industry Award” in recognition of his business achievements by the Tennessee Society of CPAs. The Society also presented Howard with a leadership award for “Dedication to Excellence” in 2000. In December 1999, Ticker magazine named Howard as one of the top five Ace Advisors in the nation. The magazine noted his work for his clients as being among the “Most Innovative Investment Professionals”. In March 1998, Howard was featured in the Dow Jones Investment Advisor story, “Top Billing” for his leadership in managing wealthy clients’ estates.

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Melisa Silverman

President
Avenue M© Advisors, Inc.
Managing Partner, The Founders Group

Melisa Silverman is President of Avenue M Advisors, Inc., a national business valuation services company. Avenue M provides business valuations for both successful families implementing wealth transfers and business owners planning for growth, regulatory compliance, litigation, acquisition, taxation and transition strategies. She also consults with companies to help them build financial process improvements, sales and marketing support, due diligence and much more.

Melisa is also the Managing Partner of The Founders Group, a national company focused on providing business succession and transition services for closely held companies using a holistic and collaborative process that interferes the least in a business, yields business results increasing cash flow, profits and business value and frees up time for the business owner.

The valuation reports are compliant with USPAP and NACVA standards as well as compliant with the requirements of the IRS, SEC, ERISA and DOL. Ms. Silverman is a certified exit planning advisor through the Exit Planning Institute (EPI), and certified valuation analyst through NACVA, a senior business analyst through the International Society of Business Analysts (ISBA) and a certified machinery & equipment appraiser through the National Equipment and Business Brokers (NEBB).

The Founders Group utilizes a holistic and collaborative process to plan and implement a business transition plan for a business owner seeking to exit their business in the near to distant future.

Melisa has a BA from Indiana University and a JD from Nova Southeastern Shepard Broad Law Center.

Ms. Silverman was the 2018 recipient of the Peter Christman Exit Planner of the Year Award from the Exit Planning Institute and she was a 2017 Nominee for Leader of the Year Award from the Exit Planning Institute.

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Kimbra Spann

Attorney

Ms. Spann is the founder of Legal Spann, a firm conveniently located in the Cool Springs area of Franklin, Clarksville and Berry Hill, 5 Star Title of Tennessee, LLC, and Asset Exchange 1031, LLC, where she can assist with estate planning, real estate transfers, as well as advise small businesses and real estate investors seeking to defer capital gains taxes on their real property transfers through her role as a Qualified Intermediary. She acts as outside General Counsel to Greater Nashville Realtors, a local trade association. She is a member of the Nashville Bar Association, the Tennessee Land Title Association, and the Marion Griffin Chapter of the Lawyer's Association for Women.

Ms. Spann lives in Thompson's Station, Tennessee with her husband. She is active in Breakfast Club of Nashville, a group of women professionals, where she also serves as Board President for 2023.

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Dalih Suchet

CLTC, LTCP
Whitehall Benefits

Dalih Suchet, CLTC, LTCP wants everyone she works with to enjoy the same sense of protection, assurance and peace of mind that comes from protecting their most important assets: their families and themselves. She feels most rewarded when distilling complex financial information into an easy-to-understand road map that allows those she is advising to make informed decisions and enhance their long-term financial security.

Born in South Africa and raised in several cities in the United States, Dalih came to Nashville right after earning her B.A. in public speaking and communications. Dalih has her CLTC and LTCP designations in long-term care insurance.

In 2000, she co-founded Whitehall Benefits to help both corporations and individuals find long-term care insurance solutions that match their budget and goals. One of only a few long-term care specialists in Nashville, Dalih represents all major carriers and has a comprehensive understanding of both traditional and hybrid plans. This gives her the ability to thoroughly customize plans, as well as collaborate with financial advisors and other industry professionals. She begins by carefully listening to needs and objectives. She then analyzes any gaps in planning and researches suitable best-in-class options. The result is a succinct and understandable “executive summary” valued by clients and advisors alike. Dalih has been tapped as an expert resource for several articles and speaking opportunities.

She has founded two business networking organizations (WEB and Aging 360). She leads the Business Development Committee for Leadership Middle Tennessee (class of 2018) and is an active board member. She has been an active volunteer with Junior Achievement. She is a member of the American Association for Long-Term Care Insurance.

Dalih lives in Nashville with her husband. She has two adult children, Margot and Alexandra. The Suchet family have been members of The Temple since 2005.

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Michael F. Whitney

Financial Advisor
Wise Family Wealth

Michael Whitney is a Financial Advisor with Wise Family Wealth, LLC. He is dedicated to helping individuals and families understand investment and planning strategies. His educational focus helps clients build confidence to take action steps toward retirement and other personal goals. None of us knows the future. However, professional guidance can be instrumental in helping everyone be better prepared to face uncertainties that may head their way.

Michael is a member of the Financial Planning Association and a Chartered Retirement Planning Counselor ⊠. Michael earned his MBA from the University of Southern California’s Marshall School of Business. His training includes passing the AICPA Uniform CPA Exam.

Securities and advisory services are offered through Commonwealth Financial Network(r), Member FINRA/SIPC, a Registered Investment Adviser.

Michael is active in interfaith community relations with Circle of Friends and Family of Abraham. He has served on the Congregation Micah Board of Trustees and is a founding board member of Nashville’s www.IntersectionMusic.org and www.NashvilleJungCircle.org. Michael was nominated for the Mary Catherine Strobel Volunteer of the Year Award for work at Percy Priest Elementary School. He is the producer of the documentary film “Matter of Heart,” featuring the extraordinary journey of C. G. Jung into the soul of man.

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At the Jewish Federation of Greater Nashville, we are building a better world through Tikkun Olam. We support efforts to "repair the world" through local Jewish education, global relief efforts, and cultural events that strengthen our community's Jewish heritage.

Whatever cause you support to "repair the world", the Jewish Federation can connect you to causes and organizations that embody your values.

With years of experience under our belts, we provide you and your family with unique Jewish philanthropic expertise and support, valuable tools, and the professional know-how to make your charitable planned giving personalized, thoughtful, and tax beneficial.

Why choose the Jewish Foundation?

- **Give through a Jewish lens**
- **Maximize tax benefits**
- **Administration of your fund and professional investment**
- **Utilize staff assistance throughout the giving process to deliver support according to your charitable interests,**
- **Benefit from our Jewish community expertise, relationships and stewardship.**

Our Foundation's competitive administrative fees go back into the Jewish community, creating a double mitzvah.

GIVING OPTIONS

WAYS TO ASSURE JEWISH TOMORROWS

Have you considered making a lasting gift to YOUR Jewish community?

The goal of planned giving is to help you plan your estate and charitable giving in a way that benefits you, your family and charity. There are many ways you can make these planned gifts and enjoy tax and income benefits.

Your Goal	How It Works	Your Benefits	Your Gift
• Maintain control of your assets during life • Make a gift to charity at your death	You designate TJF and/or an Affiliate as the beneficiary of an amount or percentage of your estate by will, trust or other instrument.	• Estate tax charitable deduction • Life use and ownership of your property	BEQUEST
• Guarantee a specific gift amount • Reduced cash outlay supporting larger future gift	Purchase a new policy (or transfer an existing policy*). You name TJF and/or Affiliate as owner and beneficiary.	• Charitable deduction for premiums donated • Make larger gift than you thought possible	LIFE INSURANCE
• Transfer appreciated property avoiding capital gains tax. • Regular income for life or a term of years • Receive the benefit of tax savings from a charitable deduction	You transfer cash or appreciated property to fund a charitable trust. The trust provides you or family members with income for life or a term of years.	• Charitable deduction • Income for life or a term of years • Possible income growth over time • Avoidance of capital gains tax	CHARITABLE REMAINDER TRUST (CRT)
• Transfer appreciated property avoiding capital gains tax • Income to charity for life or term • Avoid substantial gift or estate tax • Reduced transfer cost to heirs	You transfer cash or property to fund a lead trust that makes gifts to TJF and/or Affiliate for a number of years. You may receive a charitable deduction. When the trust term ends, your family receives the remainder interest at substantial tax savings.	• Gift or estate tax deduction • Asset and appreciation passes to family at a reduced transfer cost	CHARITABLE LEAD TRUST (CLT)
• Remain in your home for life • Receive a current charitable income tax deduction	You gift property to TJF but retain the right to use the property during your life. You pay maintenance, insurance, and property taxes.	• Charitable deduction • Lifetime use of property	LIFE ESTATE RESERVED
• Make a gift to charity at your death • Name TJF and/or Affiliate as a beneficiary	You complete a change of beneficiary form, no cost involved.	• Estate tax charitable deduction • Lifetime use of asset/income • Avoid or reduce income taxed to heirs	IRA OR PENSION PLAN