Speaker Bios for 2022 Estate Planning Day

BONNIE DYAR, Bill C. Brown Associates Bonnie Dyar has been an agent since 1991. Bonnie works closely with individuals and employers to deliver insurance, retirement strategies and employee benefits. She focuses on strategic issues and analyzing current health and long-term care trends and is an agency representative in the healthcare marketplace.

Education

- Hanover College (Hanover, Indiana)
  1982, B.A. Major: Sociology, Minor: Psychology

Industry Involvement

- Life & Health Insurance Licensed (multi-state)
- FINRA Series 6 and 63
- Long Term Care certification
- Medicare and Part D certification
- Recipient of National Life Quality Award, 2000 - 2019
- Recipient of Agent of the Year (NAIFA-Bloomington), 2013
- Recipient of American United Life Insurance Company® - Leaders Club, 1998, 2019
- Member of the Local, State, and National Association of Insurance and Financial Advisors (NAIFA) - Bloomington Association President for three years
- Member of the Local, State and National Association of Health Underwriters,
  has been an agent since 1991. Bonnie works closely with individuals and employers to deliver insurance, retirement strategies and employee benefits. She focuses on strategic issues and analyzing current health and long-term care trends and is an agency representative in the healthcare marketplace.

THOMAS J. PAULOSKI is National Managing Director for Wealth Planning and Analysis, the research division of Bernstein Private Wealth Management's Private Client Group. He works with private clients and their advisors on wealth transfer strategies, focusing on tax-efficient wealth management and asset allocation decisions. Previously, Tom was a partner at the Chicago law firm of Winston & Strawn LLP, where he concentrated his practice in estate, tax, and business planning. Tom also has been a member of the Chicago law firm of Levin & Schreder, Ltd., a Vice President in the Private Client Group of Zurich Life in Long Grove, Illinois, and a partner at the Chicago law firm of Schiff Hardin & Waite.

Tom is a nationally known speaker on estate planning, tax, and insurance issues, and has written numerous articles and continuing legal education materials on estate planning topics. He serves on the faculty of the American Bankers Association National Trust and National Graduate Trust Schools, and has served on the adjunct faculty of the Cannon Financial Institute Schools. Tom has been an adjunct professor at Loyola University Chicago School of Law and has taught estate planning classes at Northwestern University Law School. Tom also has served on the editorial board of *Trusts & Estates* magazine. He retired from the United States Naval Reserve in 2003, after 21 years of service.

Tom received his bachelor of science degree in environmental engineering from Northwestern University, and his juris doctor, *magna cum laude*, from Loyola University Chicago School of Law, where he served as editor-in-chief of the *Loyola Law Journal*.

ANNE CURRY, Mallor Grodner LLP is a Board Certified Indiana Estate and Trust lawyer, as certified by the Trust and Estate Specialty Board of the Indiana State Bar Association. She has extensive experience representing clients in the areas of estate planning, estate and trust administration, and estate and trust litigation. She also practices in the area of non-profit formation and income, estate, and fiduciary income taxation.

Anne also focuses her practice on special needs planning for children and adults with disabilities to enhance the quality of life for those affected by disability and provide peace of mind for families that the needs of their loved one will be met. This planning includes establishment of third-party or self-settled special needs trusts and guardianships for adults with special needs.

Anne is a member of the Indiana State Bar Association and has served as Chair of the Estate Planning and Administration Section. She currently serves as Co-Chair of the Trust and Estate Specialty Board and is a member of the Probate Code Review Committee of the Indiana State Bar Association.

PAMELA JONES DAVIDSON, J.D., is President of ***DAVIDSON GIFT DESIGN***, Bloomington, Indiana, a consulting firm specializing in gift planning, planned giving program design and implementation, and training. She is also a Senior Vice President for ***THOMPSON & ASSOCIATES***, offering estate planning services to nonprofits; she has earned its FCEP designation. Before forming her own company in 1999, she was a charitable gift planner and consultant for three years with Laura Hansen Dean and Associates, Indianapolis, Indiana. From 1985 through 1996, she was with Indiana University Foundation, leaving that organization as its Executive Director of Planned Giving and Associate Counsel, and quadrupling its planned gift expectancies under her directorship.

Ms. Davidson received her undergraduate degree from Indiana University in 1975, and graduated *magna cum laude* and top 10% from the Indiana University School of Law at Indianapolis in 1979. She has previously been an examiner in the Estate and Gift Tax Division of the Internal Revenue Service, and later practiced business, corporate and probate law with an Indianapolis law firm before joining the nonprofit sector in 1985. Ms. Davidson was the 1999 President of the National Committee on Planned Giving (now the National Association of Charitable Gift Planners, "NACGP"), and served NCPG in various capacities during her six years on the Board, in 1995 as Education Chair, in 1996 as Secretary, and as President Elect in 1998. She served as NCPG's 2000 Nominating Committee Chair and as a past member and chair of its Ethics Committee. She is a member of NACGP's Leadership Institute, and in 2018, was inducted in the second year to its Hall of Fame.

Ms. Davidson has been on the Editorial Board of the Planned Giving Design Center, and has served as faculty of The College of William and Mary National Planned Giving Institute. She is a past board member and past treasurer of the Indiana Chapter of the

National Society of Fund Raising Executives (now, Association of Fundraising Professionals, “AFP”), and is a past board member and president of the Planned Giving Group of Indiana. She is a past president of the Network of Career Women, a Leadership Bloomington alumna, and has served on many nonprofit Boards and development committees of local charities too. She serves on the Community Advisory Board (“CAB”) of her local public television station and is a member of APTS (America’s Public Television Stations) (Lay) Leadership Council; she has served her local public radio station on its CAB too.

Ms. Davidson over her long career has made countless presentations throughout Indiana and nationally to development professionals including leadership, planned giving councils, estate and tax attorneys, accountants and financial planners, and to prospects and donors about gift planning and charitable giving techniques. She is known for her motivational and empowering messages stated in practical and pragmatic terms about gift planning advantages and options that can benefit individuals, families and valued charities all, the “how to do smartly what you already want to do,” that prompts a gift conversation.

KATHRYN DEWEESE, J.D. works primarily with individuals in the estate planning and estate administration area. She additionally practices health law, advises businesses on employment law matters and entity formation, and represents new and existing nonprofit corporations.

Kate is a member of several professional associations, including the American Health Lawyers Association, the Hoosier Hills Estate Planning Council, the Monroe County Bar Association and Indiana State Bar Association.

Kate is currently an Adjunct Faculty Member in Indiana University’s School of Public and Environmental Affairs, where she teaches Ethics in Health Administration. Kate also serves as an at-large representative on the Indiana State Bar Association’s Young Lawyers Section Council. She is a graduate of Leadership Bloomington-Monroe County (2013), and the Indiana State Bar Association’s Leadership Development Academy (2018). She was also a recipient of the Bloomington Chamber of Commerce’s 10 Under 40 award in 2019.

She earned her J.D., cum laude, from The Ohio State University Moritz College of Law, and her bachelor’s degree from Purdue University. She joined Bunger & Robertson in 2012.

CATHLEEN WEBER, MSW, LCSW is a licensed clinical social worker with 25 years of experience. She has worked as an area agency on aging case manager, on a hospice team and as an Alzheimer’s educator. She has facilitated hundreds of support groups for family care partners, developed groups for individuals with Alzheimer’s disease, provided hundreds of community education presentations and various aspects of Alzheimer’s, dementia and caregiving. Cathleen has experience as a family care partner, as her grandmother and several family members have had dementia.

She is as community advocate for seniors, having helped start the Active Aging Coalition in Bloomington as well as founding and running Better Day Club, and adult day program for individuals living with dementia, for 8 years until 2020. Cathleen loves working with seniors and continues to maintain a small part-time private practice supporting care partners and families as they navigate the increasingly complex world of health care, finances in aging and the emotional journey that comes with it. Cathleen lives in Bloomington with her husband and cats. She enjoys spending time with her family, doing creative projects and writing.