



Making Omaha a more generous community

The Omaha Community Foundation facilitates graduate-level training for professional advisors to help clients do well while still doing good.

Look for advisors with the Chartered Advisor in Philanthropy® (CAP®) designation to apply the best tax strategies, tools, and techniques to accomplish your philanthropic goals.

Congratulations 2023 CAP® Graduates

Abby Arcishewsky
ARCHWAY CONSULTING

Allie Boulay
DELOITTE

Ben Burton
LUTZ

Elizabeth Donner
BOYS & GIRLS CLUBS OF THE MIDLANDS

Matt Gerard
CREIGHTON UNIVERSITY

Jack Holmes
BRIDGES TRUST

Kris Karnes
FIRST NATIONAL BANK OF OMAHA

Colin Kastrick
KASTRICK LAW

Laura Latka
FORVIS

Brett Lindstrom
BRIDGES TRUST

Andrea Marshall
ANDREA MARSHALL CONSULTING

Anne Meysenburg
OMAHA COMMUNITY FOUNDATION

Nick Meysenburg
DVORAK LAW GROUP, LLC

Dana Ryan
METHODIST HOSPITAL FOUNDATION

Albert Varas
LATINO CENTER OF THE MIDLANDS

CAP® Alumni

Jim Ambrose
MERRILL LYNCH

Anthony Anderson
STATE FARM INSURANCE

Mike App
BRIDGES TRUST

Katie Bakhit
DUCHESNE ACADEMY OF THE SACRED HEART

Tyler Bartruff
LUTZ

Jeff Beckman
THE SALVATION ARMY

Jeremy Belsky
BOYS TOWN

Kathy Bertolini
CHI HEALTH

Bob Bertsch
UNION BANK & TRUST COMPANY

Jason Bombeck
FORVIS

Jim Boulay
LUTZ FINANCIAL

Sara Boyd
ASCEND ADVISORY, LLC

Austin Bradley
MCGRATH NORTH

Kyle Cartwright
CIVIC NEBRASKA

Kelli Cavey
OMAHA COMMUNITY FOUNDATION

Dale Christenson
UBS FINANCIAL SERVICES

Karen Cimpl Hotz
MARIAN HIGH SCHOOL

Todd Clarke
JACOB PARTNERS, LLC

Wendy Cooley
EIDE BAILLY, LLP

Renee Coughlin
MOAIC

Pat Crisler
METROPOLITAN COMMUNITY COLLEGE FOUNDATION

Diane Crowley
USA MIDWEST PROVINCE OF THE SOCIETY OF JESUS

Matt Darling
OAKDALE STRATEGIES

Ben Deaver
PANSING, HOGAN, ERNST & BACHMAN, LLP

Vanessa Denney
OMAHA COMMUNITY FOUNDATION

Brandon Dirkschneider
INSURANCE DESIGN MANAGEMENT

Dan Dittman
ERICKSON & SEDERSTROM

Joe Donovan
LUTZ

Ralph Dovali
MCMILLEN DOVALI CO., PC

Nate Driml
MADONNA REHABILITATION HOSPITALS

Sarah Duey
SMITH PAULEY, LLP

CK Duryea
UNIVERSITY OF NEBRASKA FOUNDATION

Mark Dyneck
AGSN

Brett Ebert
BALL, LOUDON, EBERT & BROSTROM, LLC

Howard Epstein

Steve Esch
AVIOR WEALTH MANAGEMENT

Laura Essay
DVORAK LAW GROUP, LLC

Terri Fallin
CONSULTANT

Mike Findley
CREIGHTON UNIVERSITY

Amanda Forker
BAIRD HOLM, LLP

Pete Froelicher
LUTZ

Linda Garbina
JOSLYN CASTLE

Cesar Garcia
CANOPY SOUTH

John Gessert
UNION BANK & TRUST COMPANY

John Glenn
MADONNA REHABILITATION HOSPITALS

Stacey Goodman
IOWA WEST FOUNDATION

Jeff Gordman
JEFF GORDMAN ADVISORY LLC

Gary Gotsdiner
MCGILL, GOTSDINER, WORKMAN & LEPP, PC

Brian Gough
HANCOCK & DANA, PC

Adam Grieser
FRASER STRYKER, PC LLO

Jon Grob
MCGRATH NORTH

C.J. Guenzel
FIRST NEBRASKA TRUST COMPANY

Andrew Guill
RSM

Dan Guinan
FRASER STRYKER, PC LLO

Nick Hall
LUTZ FINANCIAL

Dan Hamann
SPECTRUM FINANCIAL SERVICES

Brandon Hamm
KOLEY JESSEN, PC LLO

Greg Harr
O'DONNELL, FICENEC, WILLIS & FERDIG, LLP

Joe Hefflinger
LUTZ FINANCIAL

Jason Hiley
HILEY HUNT WEALTH MANAGEMENT

Steven Hill
UNIVERSITY OF NEBRASKA FOUNDATION

Tom Hosier
BERGER, ELLIOTT & PRITCHARD CPAS, LLC

James Hueter
SECURITY NATIONAL BANK

Steven Jerina
ROLLINS COLLEGE

Katie Joseph
CLINE, WILLIAMS, WRIGHT, JOHNSON & OLDFATHER, LLP

Randy Kathol
EIDE BAILLY, LLP

Tom Kelley
MCGRATH NORTH

Steven Kenney
LUTZ

Tom Kerfoot
CHILDREN'S HOSPITAL & MEDICAL CENTER FOUNDATION

Daniel Kline
FIRST NATIONAL BANK

Chris Knauf
MOUNT MICHAEL BENEDICTINE ABBEY

Susan Koesters
D.A. DAVIDSON & CO.

Sharon Kresha
BAIRD HOLM, LLP

Donna Kush
OMAHA COMMUNITY FOUNDATION

Tony LaMar
ARCHDIOCESE OF OMAHA

Ronald Lee
MUTUAL OF OMAHA

Rob Likes
LIKES MEYERSON HATCH, LLC

Dan Lindstrom
UBS FINANCIAL SERVICES

Marietta Luellen
BRIDGES TRUST

Tracy Madden-McMahon
METHODIST HOSPITAL FOUNDATION

Tom Malicki
ABRAHAMS KASLOW & CASSMAN, LLP

Brady Marlow
CARSON WEALTH MANAGEMENT

Jill Mason
KINNEY MASON

Mike McDevitt
BKD, LLP

Catherine French McGill
NEBRASKA PHILANTHROPIC TRUST

Troy McKinney
BLAND & ASSOCIATES, PC

Megan McMurry
BRIDGES TRUST

Matt Mercer
DELOITTE

Janie Meyer
EIDE BAILLY, LLP

Brian Miles
BRIDGES TRUST

E.J. Militti
MORGAN STANLEY

Lauren Steier Miltenberger
UNIVERSITY OF NEBRASKA FOUNDATION

Nick Montague
SMITH PAULEY, LLP

Eryka Morehead
COLLABORATIVE PLANNING GROUP

Matt Muehling
DELOITTE

Bob Mundy
MUNDY & ASSOCIATES

Stacie Neussendorfer
FOSTER GROUP

Charles Olsen
SUZANNE & WALTER SCOTT FOUNDATION

Janet Osborn
HANCOCK & DANA, PC

Juan Padilla

Ken Patry

Ryan Pickett
BOY SCOUTS OF AMERICA, MID-AMERICA COUNCIL

Emily Prauner
FONTENELLE NATURE ASSOCIATION

Ron Quinn
TENASKA

Joe Reding
ST. STEPHEN THE MARTYR CATHOLIC CHURCH

Trent Reinert
MCGILL, GOTSDINER, WORKMAN & LEPP

Susan Rosburg
FIRST NATIONAL BANK

Deyna Rouse
CREIGHTON UNIVERSITY

Erin Russell
HEIDER FAMILY FOUNDATION

Shannon Sands
SPRINGFIELD COMMUNITY FOUNDATION

Steve Scholer
CREIGHTON UNIVERSITY

Steve Seline
WALNUT PRIVATE EQUITY PARTNERS

James Shoquist
NORTHWEST WEALTH MANAGEMENT INC.

Andrew Sigerson
LEGACY DESIGN STRATEGIES, PC LLO

Jesse Sitz
BAIRD HOLM

Robert Skrydlak
CREIGHTON UNIVERSITY

Jeff Snyder
LUTZ

Leonard Sommer
HANCOCK & DANA, PC

Jim Sousya
EIDE BAILLY, LLP

Jenny Strako
COMPASS PHILANTHROPIC

Lisa Strutzel
LAF FAMILY WEALTH ADVISORS, LLC

Kim Sucha
KPMG

Thomas Sudyka
LAWSON KROEKER INVESTMENT

Louri Sullivan

Nick Taylor
FITZGERALD, SCHORR, BARMETTLER & BRENNAN, PC LLO

Larry Tennison

James Tews
KOLEY JESSEN, PC LLO

Michael Thompson
BOYS TOWN

Jennifer Tompkins
JEWISH FEDERATION OF OMAHA

Karen Van Dyke
EDUCATE UGANDA

Mary Vandenaek
VANDENACK WEAVER, LLC

Joe Vlock
VLOCK FINANCIAL GROUP

Daniel Waters
LAMSON DUGAN & MURRAY, LLP

Mike Weaver
VANDENACK WEAVER, LLC

Mark Weber
LEGACY SPECTRUM ADVISOR, LLC

Sabrina Weiss
OMAHA PERFORMING ARTS

Robert Wellendorf
EXECUTIVE SOLUTIONS

Kevin Welsh
MORGAN STANLEY

Paul West
CARSON WEALTH MANAGEMENT

Sean White
CLINE, WILLIAMS, WRIGHT, JOHNSON & OLDFATHER, LLP

Sherman Willis
STATE FARM INSURANCE

David Wilson
VALENTINE O'TOOLE

Nick Wilwerding
BRIDGES TRUST

Alex Wolf
KOLEY JESSEN, PC LLO

Andrew Worthington
FRANKEL ZACHARIA LLC

Clark Younman
KOLEY JESSEN