

The lead counsel for Indiana Philanthropy Alliance's (IPA) [Foundation Legal Help Desk](#) is Phillip Purcell. Purcell has specialized knowledge in grantmaking, scholarships, fund management, planned giving, nonprofit law, the Pension Protection Act, UPMIFA, and other laws that specifically affect the operations of a foundation. Learn more about Purcell's background and experience below.



PHILIP M. PURCELL

Phil Purcell currently serves as the director of planned giving for the Central Territory of the Salvation Army. In this role, he is the directional leader of 39 planned giving officers in 11 states who close approximately \$70 million in planned gifts each year. Formerly, he served as senior counsel for philanthropy on behalf of the Fellowship of Catholic University Students where he assisted approximately 20 major gift officers engaged in a \$250 million multi-year campaign with a \$100 million goal for planned giving.

Purcell has served as vice-president for planned giving and endowment stewardship at the Ball State University Foundation where he assisted with the successful completion of a \$200 million campaign, of which \$65 million in planned gifts was raised. He also was director of gift planning for the Central Indiana Community Foundation where he directed the Planned Giving Resource Center. Purcell served as director of development and planned gifts for St. Vincent Hospital Foundation and director of planned gifts and development counsel for Rose-Hulman Institute of Technology.

Purcell is an attorney and member of the American and Indiana State Bar Associations. He is Senior Consultant and the lead gift planning attorney for the Heaton Smith Group, a national charitable and estate planning consulting firm. Purcell also serves as editor for *Planned Giving Today*, a monthly national publication. He serves of counsel to the Indianapolis law firm, Fleming Stage. Purcell teaches courses on law and philanthropy, nonprofit organization law, and planned giving as adjunct faculty for the Indiana University Maurer School of Law (Bloomington, IN) and Indiana University Lilly School of Philanthropy and The Fundraising School (Indianapolis, IN). He also serves on the faculty of the American Institute for Philanthropic Studies (Long Beach State University).

Purcell serves as vice chair of the Legislation Committee of the American Bar Association's Charitable Giving and Organizations Group and as a member of the Tax-Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes states). He currently serves on the board of directors of the American Council on Gift Annuities. Purcell formerly served on the board of directors for the National Association of Charitable Gift Planners (past secretary), Charitable Gift Planning Group of Indiana (past president), Association of Fundraising Professionals - Indiana Chapter (past president), Central Indiana Land Trust, and Catch the Stars Foundation. He has written articles on charitable gift and estate planning which have appeared in *Planned Giving Today*, *The Journal of Gift Planning*, *CASE Currents*, *Planned Giving Design Center* and other publications.

Purcell has consulted on behalf of over 300 charitable organizations of all types. His consulting focuses on state and federal legal issues (e.g., bylaws, tax exemption applications), philanthropy (e.g., fundraising, gift agreements, policies/procedures, endowments, planned giving) and nonprofit governance (e.g., strategic planning, duties of boards of directors). He has served as an expert witness in court cases and trials on topics related to the law of philanthropy, nonprofit organizations, endowments, scholarships and related issues. He is a Certified Fundraising Executive (CFRE).

Purcell has spoken on topics related to law, nonprofit governance and philanthropy before national, regional, and local conferences. His presentations have qualified for continuing education credit for fundraisers, attorneys, accountants, financial planners, trust officers, and life insurance professionals throughout the U.S. Purcell received his B.A. degree from Wabash College (magna cum laude) and his J.D. and M.P.A. degrees (with honors) from Indiana University. He received a Harry S. Truman scholarship is a member of the academic honorary societies *Phi Beta Kappa* and *Pi Alpha Alpha*.