

Phil Purcell, J.D.

Senior Counsel for Philanthropy, Fellowship of Catholic University Students



Phil Purcell currently serves as Senior Counsel for Philanthropy on behalf of the Fellowship of Catholic University Students where he assists approximately twenty major gift officers engaged in a \$250 million campaign with a \$100 million goal for planned giving. Formerly, he 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. Phil 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.

Phil is an attorney and member of the American and Indiana State Bar Associations. He serves of counsel to the Indianapolis law firm, Fleming Stage. He is Senior Consultant and the lead planning attorney for the Heaton Smith Group, a national charitable and estate planning consulting firm. Phil also serves as Editor for *Planned Giving Today*, a monthly national publication. He is lead legal advisor for the national Community Foundation Legal Help Desk. Phil 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) teaching courses on planned giving.

Phil 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. Phil 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.

Phil 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, endowments, planned giving) and nonprofit governance (e.g., strategic planning, duties of boards of directors). Phil serves as lead counsel for the national *Foundation Legal Help Desk*, an online subscription service. 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).

He 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.

Phil 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 is a member of the academic honorary societies *Phi Beta Kappa* and *Pi Alpha Alpha*.