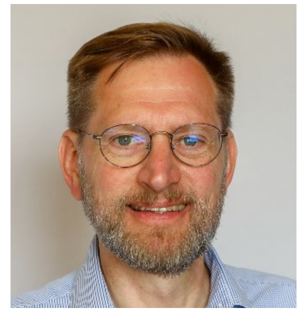
NOCGP May Meeting:
Planned Giving 101-301

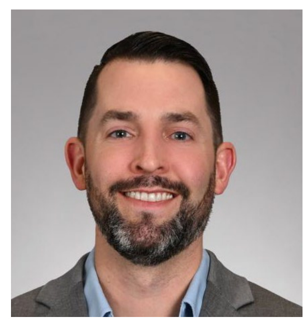
Speaker Bios



Timothy Mann
Senior Advancement Officer
Friends of Breakthrough Schools

Tim is the Senior Advancement Officer at Friends of Breakthrough Schools, the non-profit advocacy and fundraising organization that supports the Breakthrough Public Schools network. Breakthrough Public Schools serves approximately 3,000 K-8 inner-city Cleveland scholars and more than 3,000 alumni. Tim has served in this role at Friends of Breakthrough Schools for 6 years and focuses primarily on identifying, cultivating, soliciting and steward gifts from individual donors. His work encompasses annual fund, major and planned gifts of all sizes.

Tim worked in private business for 20 years before transitioning to work in the not-for-profit world. Prior to joining Friends of Breakthrough Schools, he served as the Vice-president of Development at the Western Reserve Historical Society. Prior to that, he was on the Philanthropy and Advancement team at The Cleveland Orchestra. His primary work at the Orchestra was in planned and individual giving and building the Major Gifts team for the endowment campaign in advance of the Orchestra's 100th Anniversary in 2018.



Dave Stribula, CFP, CEPA
Senior Director, Family Wealth
Sequoia Financial

Dave Stribula enjoys helping his clients unpack the answers to questions they don't know how to ask. By exploring the pros and cons of different financial decisions, people are able to arrive at the best decision for their families. Often, that means uncovering new perspectives and "what if" scenarios that are top of mind for his clients.

Dave's clients are successful families and business owners who know the value of hard work and continuous learning. They never take their time for granted and want to use their wealth to make a positive impact. Dave believes successful investors require an investment portfolio built to withstand the weather of different economic seasons and, most importantly, is anchored to a financial plan with specific goals and timeframes. Dave is a CERTIFIED FINANCIAL PLANNER™ (CFP®) and a Certified Exit Planning Advisor™ (CEPA®) He has a B.S. in Finance with a Minor in Economics from Ohio University.

Dave lives in Avon, Ohio where he's raising two daughters. He enjoys Cleveland Sports, camping, and cooking homemade BBQ.

Daniela Truver
Wealth Strategist
Sequoia Financial

Multi-generational families of wealth face unique challenges and often spend unordinary amount of time addressing the financial and legal complexities of their lives. As a wealth strategist, Daniela will help you see the big picture and work with your advisors to organize and simplify your family enterprise by employing tax efficient strategies to achieve your stated objectives. Her goal is to free up your time to do the things you love the most, whether it's building a legacy, surfing the highest wave, or solving the world's challenges.
Daniela believes that the answers to your most difficult questions are locked within you, and often can be found in candid and open conversations with family members, business partners, and advisors. Her areas of expertise are multi-generational planning and education, estate planning and fiduciary solutions, financial planning, and philanthropic planning.

Daniela is a CERTIFIED FINANCIAL PLANNER™ and a Certified Trust and Fiduciary Advisor (CTFA). She holds a Master of Finance degree with a Minor in Banking from DA Tsenov Academy of Economics, Bulgaria. She is a member of the Estate Planning Council of Cleveland.

Daniela enjoys hiking, traveling, and learning new skills. Her favorite quote is, "Where your fear is, there is your task." Carl Jung