PHILLIP H. BUCHANAN

ASSISTANT VICE PRESIDENT, GIFT PLANNING

(919) 681-0467
phil.buchanan@duke.edu
Years at Duke: 12

Phil is a 22-year veteran of development and gift planning who considers it a privilege to help good people celebrate the joy of giving. He leads Duke's Gift Planning office in helping donors, professional advisors, and Duke Development officers evaluate the best options for making a charitable gift to Duke.

Phil specializes in financial, legal, accounting, and campaign issues related to charitable giving. He is a frequent guest lecturer in classrooms and conferences, and has been featured in publications such as *BusinessWeek*, *Kiplinger's*, *Inside Higher Education*, and the *Chronicle of Higher Education*.

Phil was the senior director of development at Virginia Tech prior to joining Duke. He previously worked with Ralston-Purina Company and Willcox & Savage, a law firm based in Virginia. Phil is a graduate of Virginia Tech and earned his law degree from Washington & Lee University.

WHEN HE'S NOT AT WORK, PHIL:

- Attempts to solve the mysteries of the universe for three inquisitive young sons.
- Plays hard outdoors—fishing, hiking, golfing, skiing, and scuba diving.

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February 2015

DUKE forward

SARAH K. FISH '82

SENIOR DIRECTOR OF TRUST AND ESTATE ADMINISTRATION

(919) 681-0462
sarah.fish@duke.edu
Years at Duke: 19

With 19 years' experience in gift planning and development at Duke, Sarah manages the university's trust and estate program of about 600 accounts. She also oversees bequests from donors who include Duke in their estate plans.

Sarah loves to meet new people, something she gets to do often in her role. She enjoys helping connect donors' passions with a meaningful gift. Prior to joining the university, she worked as a trust officer at North Carolina Trust Company.

Sarah volunteers on a number of Durham nonprofit boards. She is a third-generation graduate of Trinity College of Arts & Sciences at Duke University who bleeds blue for all Duke sports.

WHEN SHE'S NOT AT WORK, SARAH:

- Plays the role of über-aunt extraordinaire to her nieces and nephew in Durham.
- Walks the neighborhood with her energetic and charming toy poodle, Newby.

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JEREMY D. ARKIN
DIRECTOR OF GIFT PLANNING

(919) 613-6195
jeremy.arkin@duke.edu

Years at Duke: 8

With 14 years' experience in gift planning and development, Jeremy helps alumni find ways to give to Duke that complement their larger personal and financial goals. He understands the ins and outs of giving techniques that involve tax, retirement, and estate planning. He also develops strategies for donating complex assets such as real estate and private business interests.

Jeremy gets the most joy out of helping others—donors, co-workers, and community members alike. He donates his time to the Durham Literacy Center as a volunteer and board member.

Jeremy has also practiced corporate and securities law at a large firm in Atlanta. He earned his law degree from the University of North Carolina at Chapel Hill and his undergraduate degree from Haverford College.

WHEN HE'S NOT AT WORK, JEREMY:

- Channels John Entwistle while playing bass guitar in his band.
- Fosters rescue dogs at his home in Chapel Hill.

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February 2015

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KRISTEN BROWN SMALLEY

SENIOR GIFT PLANNING COUNSEL

(919) 681-0461
kristen.smalley@duke.edu
Years at Duke: 6

Kristen is a tax attorney with extensive background working with nonprofits and gift planning. At Duke, she is responsible for working with donors who are including philanthropy as a component of their overall financial, retirement, and estate plans, as well as donors who give non-cash gifts to Duke such as stock, real estate, or company interests. Her 16 years of tax and legal experience make her uniquely qualified to help her clients think creatively about financially savvy ways to support their love for Duke. Even with her technical expertise and background, she has an uncanny ability to simplify complex concepts and present them in straightforward, practical terms that donors appreciate.

Kristen loves her job and is tickled to see how excited Duke donors get when they see their passions come to life through their gifts.

Kristen graduated from the University of Washington, and earned her law degree magna cum laude from Gonzaga University School of Law. She also has extensive training in tax law, holding an LLM degree with honors from Georgetown University Law Center.

WHEN SHE'S NOT AT WORK, KRISTEN:

- Pounds the pavement training for a two-day, 200-mile team relay race (and an occasional half marathon thrown in for fun).
- Explores Bald Head Island by foot, bike, and golf cart with her husband and son.

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ANNE MORRISON BRADLEY

ASSOCIATE DIRECTOR OF GIFT PLANNING

(919) 684-2123
anne.bradley@duke.edu
Years at Duke: 3

Anne uses her more than six years of development experience to help donors identify strategies to give back to Duke in ways that best suit their individual needs and goals.

Anne loves her job because she believes that passionate people can truly change the world in big and small ways through their gifts. Applying this philosophy to her personal life, she and her husband support a child literacy program in India.

Prior to joining Duke, Anne managed corporate, foundation, and government fundraising for the Detroit Zoological Society. Anne earned her bachelor's degree from the University of Notre Dame and has spent time abroad in Cairo, Egypt.

WHEN SHE'S NOT AT WORK, ANNE:

- Visits so many National Parks, Teddy Roosevelt would be proud.
- Gets crafty with a knitting needle and yarn.

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ANNE SHERMAN '94

ASSOCIATE DIRECTOR OF GIFT PLANNING

(919) 681-6750
anne.sherman@duke.edu
Years at Duke: 9

Anne works with donors to identify charitable giving opportunities that benefit the university and meet donor's personal and financial goals. She particularly enjoys working with members of the Duke community who value the university and the Duke experience as much as she has.

Anne is an alumna of Trinity College of Arts & Sciences at Duke University, where she was also a varsity cheerleader from 1991-1994. Anne and her husband, who is a double-Duke alumnus, enjoy cheering on the Blue Devils with their two daughters at Cameron and Wallace Wade.

Anne earned her law degree from the University of Chicago Law School, and worked as an assistant director of the College Fund at Chicago. After graduating from law school, Anne practiced employee benefits law at firms in Chicago and Raleigh, where she advised clients about the implications of the Tax Code and ERISA as they related to their employee benefit plans. Immediately prior to joining the gift planning team, Anne served as the assistant dean of academic advising at Duke Law.

WHEN SHE'S NOT AT WORK, ANNE:

- Enjoys fitness, spending time with her middle-school aged daughters and her husband, whom she met on her freshman hall at Duke, and reading good books.
- Volunteers on the Duke Presbyterian Campus Ministry board.

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