



American Endowment Foundation



Carol Lee Stephan **Giving Services Strategist**

In her role as Giving Services Specialist, Carol is the point of contact for all philanthropic and charitable related legal and technical questions. She assists AEF, donors and financial advisors with matters relating to non-corporate giving strategies, techniques and vehicles. Over her 30-year legal career, Carol has served individuals on a variety of family and estate planning issues. She has also served as internal counsel for a northeast Ohio insurance company.

Over the last 5 years, Carol became dedicated to the non-profit sector and designed, implemented and grew comprehensive major and planned giving programs that resulted in significant charitable giving and support of organizational priorities at Sutter Health (California Pacific Medical Center Foundation in San Francisco), the University of California Davis School of Law, and the International Rescue Committee in New York City.

Carol is a graduate of the University of Cincinnati College of Law and Kent State University.

Founded in 1993, AEF is an IRS recognized public charity. AEF is the largest independent donor advised fund in the country. AEF was founded to provide personalized solutions and donor focused service. A donor advised fund is an account sponsored by AEF into which a donor is able to make an irrevocable gift of various assets, both liquid and illiquid. The donor recommends grants to qualified charities and nonprofit organizations that the donor desires to support.

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