



**Joe Chickey, MBA, CFP<sup>®</sup>**  
**Senior Vice President**  
**and Senior Consultant**

Joe Chickey brings more than 30 years of experience in the charitable arena, with a focus on gift planning. Based in Asheville, North Carolina, Joe has spoken locally, regionally and nationally on planned giving to estate planning councils, community foundations, AFP, CASE and CGP groups. His engaging style creates upbeat and helpful peer interactions when speaking on relevant topics, especially ethical issues in fundraising.

Recent speaking engagements include the Chicago Council on Planned Giving and the National Capital Gift Planning Council (DC) as well as onsite training for Purdue University, the University of Texas Systems and the University of Oklahoma. Joe has also served as a board member of the National Association of Charitable Gift Planners (CGP) and is a current member of the Leadership Institute. He is particularly experienced in working with hospitals and other healthcare organizations and educational institutions, including higher education and private high schools.

Joe has previously worked as a gift planner for nonprofits and as a bank trust officer for financial institutions. In the nonprofit arena, he served as director of gift planning for both the University of Illinois Foundation, where he was the lead fundraiser for a \$1.5 billion capital campaign, and at Rush University Medical Center in Chicago, where he spearheaded a \$500 million capital campaign. He was also a planned giving officer for St. Jude Children's Research Hospital. He has administered charitable remainder trusts, lead trusts, gift annuities, life estates and IRA gifts.

During his 14 years in banking, he worked with nonprofit endowments, family foundations and high net worth clients. His expertise includes estate and financial planning, asset management and charitable planning. As a vice president and trust officer for Regions Bank, he was a leader in the Endowments and Foundations Group and worked with more than 125 charities throughout the Southeastern United States.

Joe earned a Bachelor of Arts degree in finance from Rhodes College and a master's degree in business administration from the University of Illinois.

**Popular speaking topics:**

- Opportunities to Capitalize Now on Gift Planning.
- Money Today and Tomorrow.
- Opportunities With Noncash Assets.
- The Art of The Ask.
- Case Studies in Gift Planning: Actual Donor Success Stories.

Contact info:

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