

Bryan K. Clontz, CFP®, CLU, ChFC, CAP, AEP

Bryan is president and co-founder of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management consulting, life insurance appraisals and CRT/CGA investment management. He also serves as a Senior Consultant for Ekstrom & Associates – a Connecticut-based community foundation consulting firm.



From 1993-2003, he served as the vice president of advancement at The Community Foundation for Greater Atlanta and the national director of planned giving for Boys & Girls Clubs of America. He received a bachelor's of science in business administration from the College of Charleston in Charleston, SC; a master's degree in risk management and insurance from Georgia State University in Atlanta, GA; and a master's degree in financial services from the American College in Bryn Mawr, PA.

At 24, Bryan became the youngest South Carolinian to ever earn the certified financial planner designation (CFP®), and subsequently earned the chartered life underwriter (CLU), chartered financial consultant (ChFC), accredited estate planner (AEP) and chartered advisor in philanthropy (CAP) designations. For six years, he served as a graduate adjunct professor of personal financial planning and life insurance in the Department of Risk Management and Insurance at Georgia State University. He serves on the Editorial Board of the Planned Giving Design Center, the Advisory Board for the American College's Chartered Advisor in Philanthropy designation, the American Council on Gift Annuities' Rate Recommendation Committee and the National Committee on Planned Giving Board for 2007-2010. Bryan has also owned a NAPFA fee-only financial planning firm since 1996 focusing on middle-market clientele.

He has given more than 400 presentations on financial planning and planned giving topics; been published in an international insurance textbook; and written more than a dozen articles in financial services and planned giving journals, including a planned giving manual entitled Just Add Water, which has sold more than 2,000 copies. Bryan chaired the inaugural statewide *Leave a Legacy Georgia!* campaign. He has also served as an expert witness on charitable gift annuity default and reinsurance and is the principal inventor of a patent-pending CGA risk management process (LIRMAS- Life Income Risk Management Analytic Suite).