



## Kathryn W. Miree, Consultant

Coxe Curry & Associates has developed a strategic partnership with Kathryn W. Miree & Associates, Inc., a consulting firm that works with nonprofit boards and staff to develop planned giving programs and to structure, manage and grow endowment pools. Kathryn has nineteen years of consulting experience with a variety of local, regional, national and international nonprofit groups, and offers services that include development and planned giving audits; committee support in developing gift acceptance, endowment and stewardship policies; board training; and deferred gift program design. Kathryn has worked with Atlanta area clients such as Atlanta History Center, Children's Healthcare of Atlanta Foundation, Emory University, Habitat for Humanity International, Arthritis

Foundation, and Boys & Girls Clubs of America. Representative clients outside the Atlanta area have included Georgetown University, the Mayo Clinic, The McCallie School, The Nature Conservancy, St. Louis Children's Hospital, United Way of America, University of Pennsylvania and World Vision USA.

Prior to establishing Kathryn W. Miree & Associates, Inc. in 1997, Kathryn served as a law clerk for a U. S. District Judge and spent fifteen years with AmSouth Bank (now Regions Bank) serving as Senior Vice President and Manager of the Personal Trust Department before joining Sterne, Agee & Leach, Inc. to charter its Trust Company and serve as the Trust Company's initial President & CEO.

A native of Alabama, Kathryn is active in the charitable community. She currently serves as Chair of the Board of the Community Foundation of Greater Birmingham. She has also served as Board Chair of United Way of Central Alabama, Board Chair of Altamont School, President of the Independent Presbyterian Church Foundation and on numerous governing and advisory boards for other nonprofits.

Professionally, Kathryn has served as President of the National Committee on Planned Giving (now the Partnership for Philanthropic Planning), President of the Alabama Planned Giving Council and President of the Estate Planning Council of Birmingham. She has also served on the board of the National Association of Estate Planning Councils and on the Editorial Advisory Board of Planned Giving Today.

Ms. Miree is a frequent lecturer, co-author of *The Family Foundation Handbook* with Jerry J. McCoy (CCH Publishers, 2001) and author of *The Professional Advisor's Guide to Planned Giving* (CCH Publishers, 2001).

Kathryn received her undergraduate degree from Emory University and her law degree from The University of Alabama School of Law. She is married to Ben Miree and they have one adult son.

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