

Paul Caspersen, CFP,[®] MS

UF



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Paul Caspersen, Executive Director for Gift Planning at the University of Florida Foundation, Inc., brings complex financial thinking to the estate planning process. Paul is a thought leader in the charitable planning field among Certified Financial Planners. As a Certified Financial Planner, Paul has more than 18 years of financial, estate, and charitable planning experience. Paul and his office are tasked with an overall combined Gift Planning goal over \$100 Million annually. He is a key member of the Senior Management Team that is directing UF's next comprehensive campaign.

Paul was the Executive Director in the Office of Gift Planning at the Iowa State University Foundation from 2009 to 2013. Prior to that, Paul was a Wealth Management Advisor with TIAA-CREF and served as the Firm's Managing Principal for Iowa. Mr. Caspersen earned a Bachelor of Arts degree from the University of Northern Iowa and a Master's degree in Financial Planning from the College for Financial Planning in Denver, CO. Paul is author of the financial planning book entitled, "*Direction Memo: How to Write a Letter of Instructions for Your Estate Plan.*"

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