

Bio

Dana J. Holt, JD RICP AEP

Dana is the founder of HOLT Consulting where she guides charities, families, and financial advisors through complex charitable giving strategies. She also trains development staff to better identify and facilitate major and planned gifts.

Dana spent four years as an Advanced Planning Consultant at a Fortune 500 financial services company. There she guided and educated financial advisors from coast to coast through complex client matters such as tax planning, charitable giving, estate planning, real estate, social security and beyond.

Dana honed her charitable planning experience during her nine years as a Charitable Gift Planner at InFaith Community Foundation (formerly Lutheran Community Foundation). There she helped to facilitate hundreds of planned gifts using everything from cash to crops to cows, real estate, royalties, and more.

Dana began her professional career as an estate planning attorney in the Twin Cities. She graduated from Mitchell Hamline School of Law and Southern Illinois University. She lives in Lauderdale, MN with her two retired racing greyhounds.

Dana.Holt@HoltPlannedGiving.com
www.HoltPlannedGiving.com
612-297-1144

