

James F. Normandin

Prior to launching his consulting practice in 2016, Jim spent 32 years with Memorial Medical Center Foundation the last 10 years as President.

He has extensive experience in the design, implementation, and management of wealth transfer planning, from simple to complex, designed to meet the financial, estate and philanthropic goals and objectives of the client. His frequent seminars and speaking engagements to professional audiences across the country have earned him a reputation as one of the leading specialists in the Charitable Gift and Tax Planning field. He has served as an expert witness involving intervivos and testamentary charitable planning.

Jim, counsels individuals, families, and their advisers on the best method to optimize income, minimize taxation, facilitate meaningful wealth transfer and meet their philanthropic objectives.

For Non-Profit Organizations he assists with the design, implementation, and management of all aspects of a successful major and planned giving program.

Jim is co-founder and faculty of The American Institute for Philanthropic Studies, an independent, public educational foundation devoted to increasing awareness, training, and participation of planned giving professionals and the legal, tax, and financial communities in charitable giving. Successful completion of the course curriculum, presented in six modules, and submission of a Practicum leads to a professional designation of "Certified Specialist in Planned Giving" (CSPG cm).

An Eagle Scout and graduate of California State University Long Beach, he published and co-edited "The Charitable Alternative" newsletter for planning professionals and is a member of the Orange Coast Estate Planning and Trust Council, National Association of Charitable Gift Planners and Planned Giving Roundtable of Orange County. Currently, Jim, serves on the boards of Orange Catholic Foundation, California State University Long Beach 49er Foundation and Farmers and Merchants Trust Company.

Jim resides with his wife Peggy in Costa Mesa, California, where they raised their three sons.

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PROFESSIONAL EXPERIENCE **Memorial Health Services**, Fountain Valley, California

Vice President Gift Planning, October 2015 – March 2016

Primary planned giving fundraiser for five hospitals and their centers of excellence and related clinics.

- Partnered with Foundation leaders and hospital executive leadership to strengthen a culture of philanthropy;
- Cultivated trustees and other leadership donors for key initiatives;
- Implemented a system wide planned giving program to support the needs of the various Hospitals and their campaigns and initiatives.

Memorial Medical Center Foundation, Long Beach, California

President, January 2005 – October 2015

Oversaw the fundraising for Long Beach Memorial, Miller Children's & Women's Hospital Long Beach, Community Hospital Long Beach, their centers of excellence and related clinics. During this term the Foundation assets grew from \$102 Million to over \$181 Million and support granted for the Hospitals and programs exceeded \$ 94 Million.

- Worked closely with hospital leadership to set priorities for philanthropic support;
- Along with the Foundations Board of Directors managed \$181 Million unrestricted, restricted and temporally restricted assets;
- Successfully recruited new members to the Board annually that maintained 100% annual philanthropic support along with active committee participation;
- Oversaw the annual operating budget of \$2.9 Million along with the annual fundraising goal of \$15.3 Million in new funds raised;
- Managed an annual support budget of \$6.8 Million for patient programs, research, clinical capital and medical education;
- Launched and completed a \$23.8 Million Capital Campaign for Miller Children's Hospital Pavilion "Building for Children" exceeding goal;
- Managed a staff of 16 who implemented the annual giving, major and planned gifts, grants and bequest programs and

- stewarded existing and future donors;
- Cultivate, solicit and steward donors for the planned giving program including annuities, charitable trust and bequest.

**Memorial Medical Center Foundation, Long Beach,
California**

Executive Vice President, September 1989 – December 2004

Responsibilities included oversight and management of all aspects of planned giving fundraising program.

- Worked closely with President of Foundation and its Board of Directors to implement and manage a successful planned giving program;
- Worked closely with VP Finance and Board Finance Committee to steward philanthropic funds of the Foundation;
- Supported the first Capital Campaign for capital and endowment which achieved its goal of \$40 Million;
- Grew the planned giving program with over 200 active annuities and charitable trust.

**American Institute of Philanthropic Studies, Long Beach,
California**

January 1994 – Present. Co-founder and founding faculty of The American Institute for Philanthropic Studies, an independent, public educational foundation devoted to increasing awareness, training, and participation of planned giving professionals and the legal, tax, and financial communities in charitable giving. Successful completion of the 12 courses, presented in six modules, leads to a professional designation of “Certified Specialist in Planned Giving” (CSPG cm). Curriculum delivered in partnership with California State University Long Beach University Extension.

Memorial Medical Center Foundation, Long Beach, California

Vice President, Planned Giving, January 1984 – August 1989

Implemented a formal Planned giving program to support the goals and objectives of Memorial Medical Foundation in Support of Long Beach Memorial and Miller Children's Hospital.

- Initiated outreach into the community to estate and financial professionals (Attorneys, CPA's, CFP's, Securities Brokers, Trust officers and Real Estate) to build a referral network;
- Developed and presented continuing education presentations focusing on charitable tax planning;
- Built a successful planned giving program that continues today.

New York Life Insurance Company

Independent Agent, August 1974 thru January 1984

International Business Machines (IBM)

Office Products Division support services January 1974 – July 1974

EDUCATION

California State University Long Beach

Bachelor of Science, June 1973