



National Philanthropic Trust

NPT Donor-Advised Fund for UBS

Your dedicated support team provides charitable expertise across the country.

UBS Primary Contacts

U.S. West



JEFF GEROLD, CFP®, CEPA
Senior Director of Development, Southwest
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Jeff Gerold, CFP®, CEPA is Senior Director of Development, based in Austin, Texas. He leads the U.S. West team of Regional Directors and covers the Southwest region, which includes AR, AZ, CO, LA, NM, OK and TX. He is responsible for business development, relationship management and advanced philanthropic planning.

U.S. Team:



JANOS MAJOR, CAP®
Regional Director of Development, West and Midwest (interim)



FERNANDO GONZALEZ, CAP®
Regional Director of Development, Mid-Atlantic



ETHAN BURKE, CAP®
Regional Director of Development, Southeast

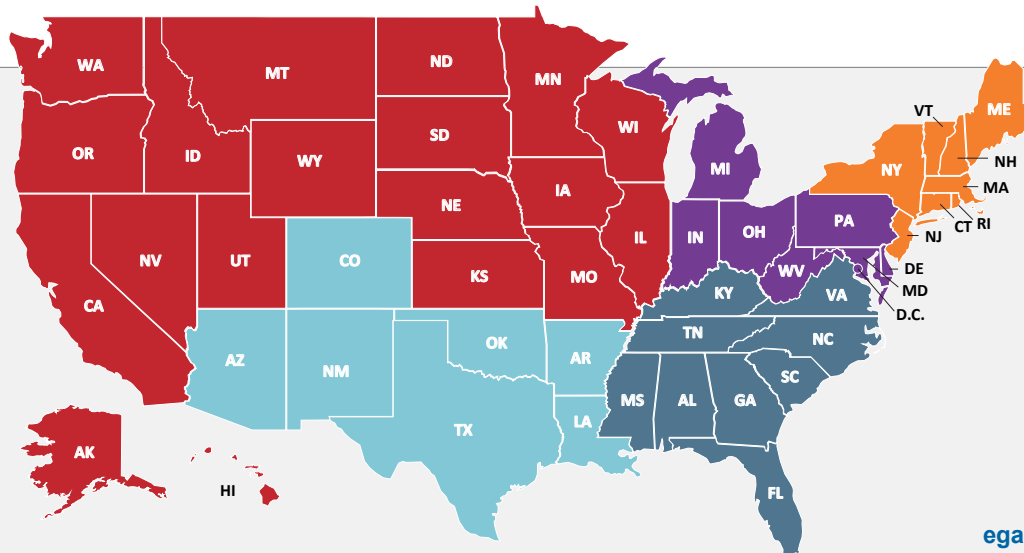
About the Advisor Services Team:

NPT's Advisor Services team is an inside development and support group that expands the capacity of NPT's Regional Directors. Skilled and detailed, the team delivers personalized and expedited service and proactive outreach to elevate the advisor experience.

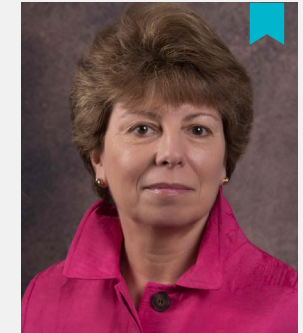
advisorservices@nptrust.org | 888-878-7900

Advisor Services can assist with the following:

- Onboarding new advisors
- Facilitating DAF account opening
- Guidance for DAF transfers
- Direction for legacy planning
- Navigating process
- Demonstrating the donor portal
- Supporting client presentations



U.S. East



ELLEN GALLUCCIO, CAP®
Senior Director of Development, Northeast
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Ellen Galluccio, CAP® is Senior Director of Development, based in Stamford, Connecticut. She leads the U.S. East team of Regional Directors and covers the Northeast region, which includes CT, MA, ME, NH, NJ, NY, RI and VT. She is responsible for business development, relationship management and advanced philanthropic planning.

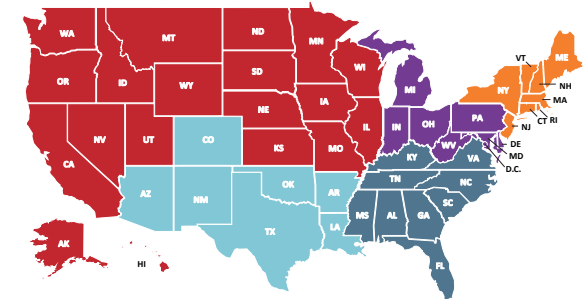


NPT's Development Team



JAIDIP (JAI) CHANDA | Boston, MA
Chief Business Development Officer
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Jai Chanda brings decades of multidisciplinary expertise in the financial and philanthropic sectors to his role as Chief Business Development Officer. He is responsible for business development, institutional relationships and strategic partnerships at NPT.



JEFF GEROLD, CFP®, CEPA | Austin, TX
Senior Director of Development, Southwest
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Jeff leads the U.S. West Team of Regional Directors. He has worked in advanced charitable planning for more than a decade and his experience includes a broad spectrum of charitable contributions such as private company stock, restricted and control stock and alternative investments like hedge or private equity funds.



ELLEN GALLUCCIO, CAP® | Stamford, CT
Senior Director of Development, Northeast
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Ellen leads the U.S. East Team of Regional Directors. She has more than 20 years of experience in financial markets, previously as Managing Director of Global Markets Americas at Natixis, Director of Foreign Exchange Sales at Credit Agricole and VP and Manager at JP Morgan Capital Markets.



JANOS MAJOR, CAP® | San Francisco, CA
Regional Director of Development, West and Midwest (interim)
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Janos has focused on HNW clients and has experience in retirement planning, investment strategy and estate planning. Previously he worked for Fisher Investments as an Investment Counselor and for PNC as a Financial Specialist.



DAWN FOURNIER | Chalfont, PA
Regional Director of Development, Northeast
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Dawn has assisted HNW families with wealth management, first with The Carlyle Group and later with Credit Suisse, Merrill Lynch, and Stifel Financial.



LISA BARR, CAP® | San Francisco, CA
Regional Director of Development, West
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Lisa has extensive experience in the charitable sector, recently as Director of Philanthropic Entrepreneurship at Silicon Valley Community Foundation. She has served as an executive director and fundraiser for arts organizations in Boston.



FERNANDO GONZALEZ, CAP® | Philadelphia, PA
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Fernando has a background of wealth management and nonprofit experience, as well as governance and community engagement. Previously, he served as a financial advisor at Merrill Lynch and wealth advisor at PNC Wealth Management.



ETHAN BURKE, CAP® | Charlottesville, VA
Regional Director of Development, Southeast
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Ethan has expertise in advanced charitable planning, including assisting UHNW families in legacy planning with complex assets. He previously worked at St. Jude Children's Hospital, and as a financial advisor at Merrill Lynch.

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