

EDWARD "Ed" Fjordbak curriculum vitae, business and volunteer experience

Office Address: 7400 University Hills Bl. Ofc. 326 Founders Hall rev 1.14.2025 Dallas Texas, 75241 Edward.Fjordbak@UNTDallas.edu

EDUCATION:

Southern Methodist University School of Law, Juris Doctor, 1999

Licensed to practice law & admitted to the State Bar of Texas - 1999

Southern Methodist University - Master of Liberal Arts Degree, 1986

Southern Methodist University - Bachelor in Business Administration, Industrial Management,

Studies in Electrical Engineering, 1969

Delta Sigma Pi (Professional Management Fraternity) Secretary 1967-68 Sigma Iota Epsilon (Management Honorary Society), bestowed 1969

Sigma Beta Delta (Business Honorary Society) 2024

Hillcrest High School (Dallas), 1964

PROFESSIONAL BUSINESS CAREER:

Current:

<u>University of North Texas – Dallas</u>

Lecturer in Law, School of Business Aug. 2019 (previously Adjunct Professor beginning Fall Semester 2014) - present Taught 25 equivalent semesters of 3-hour upper-level classes in the School of Business. Classes: Legal Aspects of Employment Law; Corporation Law; Business Law (Legal & Ethical Aspects of Business), Business Ethics & Social Responsibility, Business Communications, Real Estate Markets and Valuations. Committee and other activities: Selection Committees, Title IX hearing officer, Sigma Beta Delta sponsor, Pre-Law Society Faculty advisor/sponsor, Strategic Planning Committee - School of Business 2024-25. Marketing Committee 2024-25,

Trailblazer Advisory Group LLC

Member since 2021- An advisory team of four who are available to advise on real estate matters, development and growth, primarily in the Southern Sector of Dallas, formed in 2020 and formalized as a business entity in 2021

PAST PROFESSIONAL CAREER ROLES (primary paid positions in bold):

Shamrock Asset Management

Managing Director, Chief Compliance Officer

March 1, 2013 – December 31, 2019

A Registered Investment Advisory firm using Exchange Traded Funds to gain efficiency, speed and more accurate entry and exit strategies related to market sectors as they have increased potential to improve or decline. Responsible for assisting with legal matters, serving on the organization's Investment Committee, Marketing Committee, and primary Chief Compliance Officer, interfaced with the Securities Exchange Commission.

Essilor Vision Foundation, Inc.

President & CEO (reporting to Chairman of Essilor in Paris, France) Sept. 9, 2009 – Dec 31, 2011 Consultant for the foundation Essilor of America & International Jan. 2-2012 – Feb. 28, 2013 A recently formed charitable entity providing free eye exams and glasses to disadvantaged children in the

U.S. and developing countries. Responsibilities included designing processes to make the program scalable to reach larger numbers and broaden the program across the U.S. and developing countries, raising support, building strong relationships with donors and partners, development of an Advisory Board, industry and community relations, developing new markets in new areas, in-house legal reviews, negotiation with Independent School Districts and other organizations to move the mission forward, allowing students with vision problems access to education.

Texas Capital Bank, N.A. Dallas, TX

Sr. VP, Corporate Banking, Non-Profit Group, Wealth Management & Trust Jan. 2005- Sep.8, 2009
Development and maintenance of client relationships. Organized attorney and prospect gatherings. Reviewed legal issues for the bank and for clients. Made client and prospect presentations and speeches involving complex investments and business arrangements. Assisted clients with analysis of goals, with planning and execution carried out by the bank. Brought loan customers to the bank primarily in connection with acquisition of businesses in private equity investment context.

Communities Foundation of Texas, Inc., Dallas, TX (total of 32 years)

President (top staff position)

1987-2004

Executive Vice President and Secretary (top staff Position- the volunteer Chairman held the

President and CEO title as a matter of tradition, became top paid staff in 1982). 1978-1987

Executive Secretary
Administrative Assistant

1974-1978 1972-1974

This entity gathered charitable funds from individuals and corporations to create charitable funds, then then managed the assets – which included real estate, partnership interests, intellectual property, oil and gas interests and S Corporations. Carried out the donor's philanthropic intentions through a grant review and awards process, and handled the accounting, communication and public awareness responsibilities. It grew from \$10 mm in 1972 to around \$650 mm in 2004, not including several other "controlled" entities totaling another \$300mm, representing nearly 700 named philanthropic funds at the end of 2004. The top paid staff person, regardless of title, was ultimately responsible for planning, fund development, administration, investing, facilities, legal compliance and staffing. Creating strong donor and donor prospect relationships and

managing the various assets were the primary responsibilities. It is similar to a bank or trust company

exclusively for philanthropists.

Climax Timber Company - A wholly owned subsidiary of

Communities Foundation of Texas, Inc.

President (ex officio position)

1972-2004

This entity operated certain of the foundation's real estate

Dallas Community Chest Trust Fund, Inc. - A wholly owned subsidiary of

Communities Foundation of Texas, Inc.

President (ex officio position)

1972-2004

This entity preserved and protected the foundation's former name

Sarita Sewer System & Water Supply Corporation

President

1985-2007

This non-profit entity was designed to carry out a foundation donor's charitable intent

Ray L. and Nancy Ann Hunt Foundation (\$40mm+)

Vice President

1989-2004

This entity held assets and carried out the charitable interests of a foundation client family

The Ruth Foundation (\$40mm+)

Vice President

1989-2004

This entity held assets and carried out the charitable interests of a foundation client individual

D-H Properties (a subsidiary of Communities Foundation of Texas)

President

1991-2004

This entity held the assets of a real-estate development subsidiary

The Robert and Nancy Dedman Foundation

Vice President, 1999-2004; Investment Committee

2003-2004

This entity held assets and carried out the charitable interests of a foundation client family

Collins Radio Company, Dallas, Texas

1967 - 1972

Industrial Engineering Division, Engineer, and worked with Corporate Counsel to sell the company's **Broadcast Division**

CURRENT & RECENT CLUBS, CIVIC ORGANIZATIONS, CIVIC WORK and AFFILIATIONS:

Immediate Past Honorary Consul of Norway, Dallas, Texas

Honorary Consul of Norway - since 1996- 2022 (pro bono service, still involved as immediate past consul)

Consular jurisdiction of North Texas to Temple - West Texas to El Paso and Amarillo

Knighted by order of HRH Harald R, King of Norway, 2005

Rotary Club of Park Cities Member since 1984 (perfect attendance record through Mar. 2020, pandemic onset)

- Program Committee Chairman 1986
- Environment Committee 1986-87
- Board of Directors 1984-85
- Paul Harris Fellow, Frank Monroe Fellow
- Chairman, Rotary Club of Park Cities Foundation Executive Committee 1990-present

Woodall Rodgers Park Foundation - Board of Directors/Steering Comm. 2006-present,

Executive Committee, Secretary to the Board 2008-present, Investment committee 2019-present

Klyde Warren Park Planned Improvement District –

A City of Dallas PID - Board of Directors, February 2014 - present

Dallas Knife & Fork Club -Board Member 1991-2003 - March 2014 (Member since 1990)

President 1997-1998

This is Dallas' oldest Black-Tie dinner club (formed in 1924)

Highland Park Presbyterian Church:

Member 1986-present, Deacon 2002-Aug. 2018, Deacon Team leader 2005-2011, Moderator or Vice Moderator of the Deacons Sept. 2011 - Sept. 2014 which included positions as Deacon Representative to the Session, and positions on the Management Committee, Officer Nominating Committee, and Congregational Care Committee, currently a reserve deacon and front door greeter.

State Bar of Texas 1999 - present

Dallas Bar Association 1999 – present (served on Probate, Estate & Trust Section Committee 2006-08 and Section's nominating committee in 2009)

OTHER CURRENT CIVIC, CHARITABLE AND RELATED ACTIVITIES:

ASSOCIATION OF FUNDRAISING 1973-2004

> PROFESSIONALS - DALLAS CHAPTER President - 1975

> > Former Board Member,

Philanthropy Awards Selection Committee 1987 - present

CONSULAR CORPS of DALLAS/FORT WORTH

1988 - Present

Protocol Officer - 1990-91 Chair, Exec. Committee 1991-92

Honorary Member (Patron) since 1991

Vice Dean 1995-96

Dean 1996-97

HARVARD CLUB OF DALLAS NORWEGIAN SOCIETY OF TEXAS

Member 1996-present Chairman, Executive Committee 1990-Present

ROTARY CLUB of PARK CITIES FOUNDATION

SOUTHERN METHODIST UNIVERSITY DEDMAN SCHOOL OF LAW

EXECUTIVE BOARD 1999-present

Board, Exec. Comm. 1989-1997 TACA (The Arts Community Alliance)

Exec. Vice President 1990-1991

President 1991-1994 Chairman 1995-1996

Chairman Emeritus 1997-present

Board of Governors, 1989-2016

WORLD AFFAIRS COUNCIL OF GREATER Board of Directors 1990-1993, 2001-2005

Executive Committee 1994-2006 DALLAS-FT. WORTH (formerly Dallas Council on World Affairs)

> Chair, Audit Committee 2002-2005 Chair, Advancement Committee 2005

Member 1990- present

THE INTERNATIONAL ACADEMIC INSTITUTE OF LEGAL PROCESS AND PROCEDURE

Advisory Board Jan. 2020 - present

HONORS AND AWARDS:

Fund Raising Executive of the Year Award - 1986

Dallas Chapter of the National Society of Fund Raising Executives (Association of Fundraising Professionals)

Daughters of the American Revolution Conservation Award – 1992

Order of Merit, Knighted by King Harald of Norway, 2005

Ethics Award, Rotary District 5810 – 2016

Sigma Iota Epsilon management honorary society 1969 (Southern Methodist University)

Sigma Beta Delta business honorary society 2024

Speak and read very limited Spanish

Addendum

PAST CIVIC AND RELATED ACTIVITIES:

Board of Trustees, 1988-1994 AMERICAN ENTERPRISE FORUM AMERICAN LUNG ASSOCIATION

Development Committee 1976-1978 BOY SCOUTS OF AMERICA - CIRCLE TEN

COUNCIL

Development Council Annual Drive 1985, 1986 Advisory Council, 1983-1990 & 2002-2006 CENTER FOR NONPROFIT MANAGEMENT

Board of Directors 1983-1990 CHILD CARE PARTNERSHIP OF DALLAS, INC.

Executive Committee 1985-1986

Co-Chairman/Resource Advisory Committee 1985

COMMITTEE FOR QUALIFIED JUDICIARY 1995-2006

CONFERENCE OF SOUTHWEST FOUNDATIONS Involved since 1975, Former Board Member

Legislative Committee 1993-96, 1998-2004

President 1989-90

Long-Range Planning Comm. 1991 Chairman of the Board, 1991-92 Site Selection Committee 1993-1995

COUNCIL ON FOUNDATIONS, Washington, D.C. Committee on Area Associations (1979-1981)

representative from Communities Foundation of Texas until

2005

CRYSTAL CHARITY BALL Advisory Committee, 1989-2007

Chairman's Advisory Council, 1995-1997 DALLAS BLACK DANCE THEATER

Member 1986-2005 DALLAS CONTRIBUTIONS NETWORK

DALLAS COUNTY TREASURER PUBLIC

ADVISORY COMMITTEE Member 1992-2005, Secretary 2000

DALLAS EASTER SEAL SOCIETY FOR

Board Member 1990-1995 **CHILDREN** Board of Governors 1988-89 DALLAS ESTATE PLANNING COUNCIL

	Member 1986- 2009
DALLAS MUSEUM OF HEALTH AND SCIENCE	2,0,0,0
DEVELOPMENT COMMITTEE	Advisory Council 1982-1983
DALLAS PUBLIC LIBRARY	Grants Information Service Board Me 1981-1986
	Member 1987-Present
DALLAS SOCIETY FOR THE PREVENTION OF	
CRUELTY TO ANIMALS (SPCA of Texas)	Advisory Board Member 1990-2007
DALLAS SUMMER MUSICALS	Board, 2000-2009
DALLAS TEEN CHALLENGE	Board Member 1973-1989
	Chairman 1975-1976
DALLAS WORLD SALUTE	Founding Committee Member,
	Board 1985-2008
DALLAS ZOOLOGICAL SOCIETY	Board 1995-2001
DESERT CHORALE (Santa Fe, New Mexico)	Advisory Council Member 1994-1997
DOMINICAN REPUBLIC Honorary Vice Consul	1987-1998
ESSILOR VISION FOUNDATION	Advisory Board 2008- 2013
EXPOSITION PLAZA PROJECT COMMITTEE	Development Council, 1986
FINANCIAL STRATEGIES CORPORATION	Advisory Council 1983-1986
FOR THE PEOPLE, INC.	Advisory Committee (1984-1990)
FRIENDS OF TEXAS BALLET THEATER f/k/a	Dallas Advisory Board 1994-2003
FT. WORTH-DALLAS BALLET	
FRIENDS OF WRR	Board 1992-1998, 2000-2002
GIRLS ADVENTURE TRAILS	Advisory Council 1984-1992
GOVERNOR'S COMMITTEE ON STATE	
ECO-TOURISM	1994-1995
GREATER DALLAS SESQUICENTENNIAL	1000 1000
COMMITTEE	1990-1992
HAAKON AWARDS COMMITTEE, SMU	1000 1000
MEADOWS SCHOOL OF THE ARTS	1983-1996
HORAS ALEGRES PRESCHOOL	Financial Development Board - 1989-
INTERNATIONAL ASSOCIATION OF FINANCIAL	3
PLANNING, NORTH TEXAS CHAPTER	Board Chairman- 1984

PLANNING, NORTH TEXAS CHAPTER JUBILEE DALLAS: CELEBRATING 150 YEARS LAKEHILL PREPARATORY SCHOOL

LEADERSHIP DALLAS ALUMNI ASSOCIATION LAUNCHABILITY FOUNDATION MAYOR'S CHILD CARE TASK FORCE MAYOR'S TASK FORCE ON ADOLESCENT HEALTH AND SCHOOLAGE PREGNANCY Member 1984

McKINNEY AVENUE TRANSIT AUTHORITY NATIONAL CENTER FOR POLICY ANALYSIS

NORTH TEXAS ESTATE PLANNING COUNCIL POSITIVE PARENTS OF DALLAS PRESBYTERIAN HOSPITAL OF DALLAS PUBLIC/PRIVATE SECTOR VOLUNTARISM **COMMITTEE** RONALD McDONALD HOUSE

SALVATION ARMY - DALLAS SPORTSMEN CONSERVATIONISTS OF TEXAS TEXAS CHAPTER MENTAL HEALTH ENDOWMENT FUND

Board Member

ard - 1989-1990 Council Board Chairman- 1984 Steering Committee 1990-1991 Development Council Member 1984-1990

Advisory Board 2011-2016 Member 1984

Advisory Council 1985-1989 Advisory Board 1984-1995 Board of Directors 1989-1996 Member 1996-2005 Steering Committee (1980's) **Development Committee 1981** Member Since 1983 Chairman 1984-2004 Development Board-Capital (Children's Oncology Services of

Texas)Campaign 1984 Capital Campaign 1984 (Team Capt.)

Board Member 1991-1996

Board Member 1982-1984

TEXAS DEPARTMENT OF HUMAN SERVICES Regional Advisory Council 1990-1994

TEXAS LYCEUM ASSOCIATION Director 1983-1990

Executive Committee 1984-1987 Vice President of Finance 1984-86

Dallas Event Planning Committee 2009

TEXAS OPERA THEATER

THE NATURE CONSERVANCY OF TEXAS

Board of Directors 1986-1989

Board Member 1984-1995;

Chairman Nominating Committee 1984-1985

Planning Committee, 1985-1986 Finance Committee, 1985-1986

Treasurer 1993-1995

Dallas Regional Advisory Committee 1992-2004

TOWER CLUB of DALLAS Charter member 1981, Society Club (Board of Governors of

Tower Club 2000-2015, Chairman, 2004-2005)

UNIVERSITY OF DALLAS
UNIVERSITY OF TEXAS AT DALLAS
Board of Councilors 1994-1998
Advisory Council to the School of

General Studies, 1983-1999

UNIVERSITY OF TEXAS AT AUSTIN

DEPARTMENT OF SOCIAL WORK Executive Committee 1983-1984

VISITING NURSE ASSOCIATION FOUNDATION Board 1993-1996

WEAVER & TIDWELL FINANCIAL Advisory Board 2003-2005

YWCA Development Council for Capital Campaign 1983

OTHER PAST MEMBERSHIPS and INVOLVEMENTS:

American Bar Association 1999 - 2007

Press Club of Dallas - Headliner

Shakespeare Festival of Dallas

500, Inc., 1976-1979 (younger person's activities to raise funds for the arts in Dallas)

Business Volunteer Council (Dallas) mid 1980's

Dallas Ski Club, 1979-1981

Dancers Unlimited Repertory Company, 1982-84

Amundsen Institute of U. S. - Mexican Studies (Fellow) 1981-83

Mental Health Association of Dallas County (1980's)

Leadership Dallas Program Participant - Class of 1984

USA Film Festival, 1983-1985

Consulate General of the Dominican Republic, Dallas, Texas

Honorary Vice Consul for North Texas area 1988 through August 1998 (pro bono service)

OTHER PAST INTERESTS:

Third Class Private Pilot License (not currently flying as a pilot or co-pilot)

Lakewood Productions (Co-founder) - a nonprofit religiously oriented video production facility, 1978

Edward M. Fjordbak

Teaching Philosophy

Education must present sufficient challenges to the student such that the student learns how to learn. In my view, teaching answers learned by rote and parroted on tests does not develop the skills needed to compete in a constantly changing, challenging world. While basics such as English, grammar and math (which can be learned to some extent by memorization and practice) are critical to the student's eventual success in a

business or profession, learning how to find and analyze information are the other critical elements. Importantly, challenging students to learn 'critical thinking' skills is woven into course assignments.

My general feelings about the importance of a higher education were summed up in a quote included in an attached newsletter publication/press release of UNT (Oct. 30, 2003, see below), in the next to the last paragraph. My professional life has always included some way to give back, and teaching is one of the best ways to help the next generation.

Students cannot learn everything by the time they have a college degree; learning is a life-long requirement for success. Developing an understanding of where to find information, how to analyze it and ascertain its veracity, and how to see it through the eyes of others, such as that of a client, customer or critic is vital. My teaching style challenges students to look for answers to real-life quandaries that require them to think about the possible answers and their consequences.

I believe in an interactive class environment, designed to encourage the shy, and to challenge both those who come to the class with fewer tools than the others, but not compromising the challenges to the limits of those who come with special knowledge or advanced exposure. Students even learn how to use a microphone and overcome the fear of public speaking. Recognizing about half are introverts, efforts are made to give them confidence and bring them out of their shell. Students in face-to-face classes have tent cards at their seats, which include their names *and* their photos. This helps them feel 'validated' and an equal part of the class.

Students are offered snacks in all face-to-face classes, and in summer with four-hour lectures, there is a dinner break where various protein-heavy frozen foods are offered, and we eat together. Multiple microwave ovens are in the classroom. Although brief, it tends to create bonds between the students. I want them to create lasting friendships that will help them later in their business careers.

I do not often use PowerPoint in the classroom, do not 'read' my lectures to the students, and I discourage the use of laptops in class except for notetaking. Rather than engage with a keyboard, I want their attention to the subject at hand.

I encourage live participation, and after each class, lecture notes are provided on-line to students generally by the end of the next day. In most classes, there will be two-to-four exams, quizzes, or submissions early in the semester in an attempt to identify students needing special attention, in hope that intervention is useful.

Both online and face-to-face students are offered field trips to the Dallas Bar Association to hear a lecture(s) on some aspect of law. I pay for their registration, meal and parking. Extra credit points are the inducement. The purpose is to expose students to a professional setting and to let them become comfortable with other professionals, boosting their self-confidence and allowing them to see what professionals look like and how they act. Other off-campus lectures and speeches are offered when appropriate.

I make myself available by e-mail, in person in the office and during scheduled and unscheduled online Zoom sessions to answer students' questions. Reasonable accommodation for those needing make-up exams is available. Sensitivity to the needs of students with accommodations is important.

Rigor is the key to success in business, therefore, my classes reflect a business-like atmosphere where accountability is regularly part of the teaching style. As a lawyer, although in this role I cannot give them legal advice, but when requested, I counsel with them on personal matters that have legal implications.

Edward M Fjordbak

Selected Articles, Papers, Publications and Opinions of Counsel

Fjordbak, Edward M. (1998). A critical Analysis of the Community Reinvestment Act: Relief Needed for Banks in View of Compliance and Intangible Costs and New Competition from Non-Banks. Southern Methodist University Dedman School of Law, presented to the Banking Class.

Fjordbak, Edward M. (1999). *The Norwegian Oil and Gas Concession Scheme: Does it Favor Norwegian Companies?* Southern Methodist University Dedman School of Law, International Oil & Gas.

Fjordbak, Ed (1983-2004). Impact, the quarterly Newsletter of Communities Foundation of Texas. *President's Column series* (generally discussing aspects of tax and estate planning law. Appx. 75 articles and columns) Appx. circulation: 18,000.

Fjordbak, Ed (1983-2004). Annual report, Communities Foundation of Texas. *Presidents Letter[s] to Donors and the Community.* (21 publications). Circulation: 20,000.

Fjordbak, Ed (April 20, 2008). A Power of Attorney Doesn't Always Carry Power for Holders. Austin Business Journal.

Yip, Pamela, Fjordbak, Ed. (May 26, 2008). *Use Durable Power of Attorney Carefully*. Dallas Morning News Post & Courier Column.

Fjordbak, Edward M. (1994). W.W. Caruth Jr., the Man and His Philanthropy. Published for the current and future boards of Communities foundation of Texas and the Trustees of the W.W. Caruth Jr. Foundation as a guide to grantmaking from the Foundation as envisioned by the late Mr. Caruth.

Mittenthal, Stephen, Ph. D., Fjordbak, Ed & others. (Nov 21, 2013). *Odd Gifts to Community Foundations* (title pending).

Fjordbak, Ed (Feb. 2012). *EVF Public Support Test Compliance Outline* (re: Secs. 501(c)(3) and 509(a)(1) of the Internal Revenue Code). (Written for the board of Essilor International, Essilor of America and the Essilor Vision foundation board and Staff).

Fjordbak, Ed (March 2012). *Memorandum re: Form 990 and the Public Support Test under Treasure Dept. Final Regulations*. (Written for Price Waterhouse Coopers and General Counsel, Essilor of America).

Fjordbak, Ed (June 18, 2007). Opinion of In House Counsel re: Legal Definition of Income in Context of a Charitable Bequest Under a Trust. Written for the Trust Managers of Texas Capital Bank Wealth Management & Trust Dept.

Fjordbak, Ed. (March 18, 2007) *Opinion of Internal Counsel re Tax and Other Implications for a Newly Created Private Foundation Contemplating Full Payout Over a Relatively Short Period ("Frontloading Grants")*. Written for Wealth Management & Trust Dept. of Texas Capital Bank and an Unnamed Client.

Fjordbak, Ed. (June 11,2012). *The Philanthropist's Rationale for Creating a Vehicle for His or Her Philanthropy*. For the Center for Non-Profit Management, Dallas.

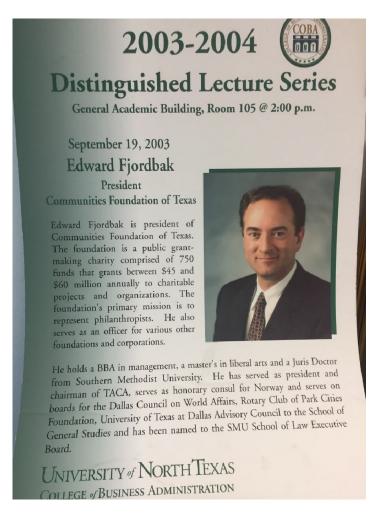
Fjordbak, Ed (2004). Analysis of "LILAC" Insurance Arrangements in Light of the Legal Environment of Charities, Tax law and State of Texas Law. (Private Opinion of Counsel for the General Counsel of Communities Foundation of Texas, its Board, and Certain Unnamed Clients).

Fjordbak, Edward M. (2006). *Philanthropy at a Crossroads*. Trusts and Estates (magazine). National Publication for Estate Planning professionals.

Fjordbak, Edward M. (May 1983). *Charitable Giving Techniques Changing*. Horizons, monthly publication of the International Association of Financial Planners, N. Tx. Chapter.

Selected Presentations as Lecturer/Instructor

University of North Texas, College of Business Administration Distinguished Lecture Series, on *The Impact of Philanthropy on Business Decisions*. Sept. 19, 2003. Denton, TX. Below is the announcement poster:



Southern Methodist University Dedman School of Law, Lecture on the *Estate Planning Aspects of Charitable Trusts and Foundations*. Lecture to the Wills and Trusts class under Prof. Regis Campfield. December 2, 1997. Dallas, TX

University of North Texas Professional Development Institute, Half-Day Lecture on *Charitable Entities and their construction under Tax Law*, 2001. P.D.I Headquarters, Dallas, TX. (See last attachment to this CV)

Center for Non-Profit Management, June 11, 2012, Lecture on the Philanthropist's Rationale for Creating a Conduit Entity. McKinney, TX

The Catholic Foundation, Lecture to the Board of Trustees, fall, 2006. *The Catholic Foundation as a Community Foundation*. Context, Legal Implications, Marketing, Client Issues, and the Role of the Board of Trustees and Staff. Dallas, TX

Texas Capital Bank, lecture on *The Heightened Duty of Trustees Under New Texas Law*. Lecture to group of attorneys and clients who serve as trustees of trusts. Dallas Country Club, Dallas, TX

> During the period from approximately 1976-2013, there have been frequent lectures and speeches given to a wide range of groups, primarily on technical elements of Charitable and Estate Planning Law. There was no attempt to keep track of those lectures, the exact topics or the dates.

UNT press releases News Categories

UNT System

Communities Foundation of Texas funds UNT at Dallas master plan Thursday, October 30, 2003

DALLAS (UNT), Texas — Communities Foundation of Texas (CFT) has announced that it will fund a planning grant for \$500,000, payable over three years, as a lead gift to fund a master plan for the new permanent campus for the University of North Texas (UNT) at Dallas. Communities Foundation of Texas is proud to help set a high standard for developing the first four-year public university in the city of Dallas. The grant was announced during a public celebration at the future UNT at Dallas campus property (located at Camp Wisdom and Houston School roads in Oak Cliff) on October 30, at 10 a.m.

Along with a host of area legislators, honored guests at the celebration included Texas House Speaker Tom Craddick, Sen. Steve Ogden of College Station, Sen. Florence Shapiro of Plano, Sen. Royce West of Dallas, Rep. Jim Pitts of Waxahachie, Dallas Mayor Laura Miller and members of the Dallas City Council.

CFT salutes the donors who created the named funds at Communities Foundation that made this planning grant possible. This grant involved ten funds at CFT including Basil Georges, Ledbetter/Styron, Pearl C. Anderson, Jesse N. Bigbee, Roberta Coke Camp, Frank and Carolyn Ryburn, Sammons Fund, Travis T. Wallace, Lone Star Endowment, and the Fund for Education. These donors cared deeply about the needs of their community and in particular, education. Their philanthropic intentions live on in grants such as this one.

"The Trustees of the Communities Foundation of Texas have stepped forward to generously fund the initial campus master plan for UNT at Dallas. A university can be an exceptional place, distinctive in its neighborhood and city, but only with careful planning. This timely CFT gift will help UNT establish the character and image of Dallas' newest university," says UNT System Chancellor Lee Jackson. "Enrollment has grown steadily for the past four years at our temporary location in Dallas, and we want to be ready now with a very high quality design for the permanent campus that will attract and serve students well, while creating a major regional asset."

"This is a once-in-a-lifetime opportunity to impact the lives of generations of community residents who will benefit from the creation of a public university that will serve as a regional center for intellectual activity and economic development. CFT is pleased to lead in the creation of this new university that, as UNT officials project, will feature an eventual enrollment of 16,000 students, 3,850 faculty and staff, and a total economic impact of \$237 million by 2030," says Jeverley Cook, Vice Presidents of Grants at CFT.

In order to accomplish this mission, a strong planning process is being put in place. The planning process will evaluate campus design in order to build a unique identity and have a positive impact on the surrounding community.

The first building at UNT at Dallas has been approved for funding and will be designed in 2004 after completion of the master site plan. Construction will begin in late 2004, as soon as master planning for needed utility extensions, transportation and other services can be completed. Teaching in Dallas will move to the new campus in the fall of 2007.

The 264-acre campus is located in Oak Cliff in the southern sector of the City of Dallas and Dallas County. The new campus is projected to increase educational access to more than 910,000 citizens in southern Dallas and Ellis counties and to serve students who transfer to UNT at Dallas from Dallas, Tarrant and Navarro county community colleges.

Ed Fjordbak, president of Communities Foundation of Texas says, "There is no better way to achieve the goals of philanthropists than to encourage a more thorough education of our citizens. All the things we do to make life better are less effective if our citizens are not able to understand, appreciate, or take advantage of those enhancements because they have an inadequate education. To provide for tomorrow's families, a breadwinner must have the tools that only an education can give. We must take every reasonable step to provide easy access to higher education. That will enable a working parent or aspiring young person to conveniently get to class while caring for family and often working one or more jobs. A four-year degree is necessary to have an impact on all areas of the community. This is money well spent."

This is a particularly important year for the Foundation. CFT is celebrating fifty years of giving since its founding in 1953. During that time, CFT has fulfilled the unique philanthropic visions of donors, both living and departed, to meet the educational, medical, civic, artistic, cultural, social service, and other needs of their community. Acting on behalf of these donors, the Foundation has distributed more than half a billion dollars in charitable grants since it was founded.

UNT News Service Phone Number: (940) 565-2108

Category: UNT DallasUNT System