

Joe Chickey, MBA, CFP

Joe Chickey brings 33 years of experience in the charitable arena, with a focus on gift planning to Sharpe/Newkirk. He is a Senior Vice President and Consulting Director with our clients. He has spoken locally, regionally and nationally on planned giving to Estate Planning Councils, AFP, CASE and CGP groups. His recent speaking engagements include the Chicago Council on Planned Giving, the Little Rock Planned Giving Group, and the Austin Planned Giving Council. Joe recently completed a three-year term as a board member of the National Association of the Charitable Gift Planners (CGP).

Joe served as lead fundraiser for a \$1.5 billion capital campaign at the University of Illinois and a \$500 million capital campaign for a major hospital in Chicago. He has closed charitable remainder trusts, lead trusts, gift annuities, life estates, and IRA gifts.

He has experience from the non-profit side and for-profit side, as a gift planner for nonprofits and a bank trust officer. For 14 years, he worked with non-profit endowments, family foundations and high net-worth clients. His expertise includes estate and financial planning, asset management and charitable planning.

As a Vice President and Trust Officer for Regions Bank, he was a leader in the Endowments and Foundations Group and worked with over 125 charities throughout the Southeastern United States. Prior to Regions, Joe was a Vice President and Business Development Officer for SunTrust Bank.

In the fundraising arena, he served as director of gift planning for the University of Illinois Foundation. He was also a major gift officer for Rush University Medical Center in Chicago and a planned giving officer for St. Jude Children's Research Hospital.

Joe is also active in the community. He is a past president of the Fifty Forward Endowment Board. He is past president of the Planned Giving Council of Middle Tennessee and a past board member of the Chicago Planned Giving Council. He has served on the boards of the Boys & Girls Club, Family & Children's Services, and Middle Tennessee Boy Scouts. He has served on Advisory Boards for University School of Nashville, Abintra Montessori, and The Nashville Symphony.

Joe earned a bachelor's degree of arts in finance from Rhodes College and a master's degree in business administration from University of Illinois.