

Curriculum Vitae

Name: Gregory W. Doepke

Date of Birth: September 23, 1949

Home Address: 1794 Covington Ridge, # 304
Auburn, AL 36830

Contact Information: Email: Greg@AspiretoGive.com
Phone: 804.937.6439

Education: Graduate: CFP® Program, College for Financial Planning, 1994;
M.S, Business (Finance), Virginia Commonwealth
University, 1984
Undergraduate: B.S., U.S. Military Academy at West Point, 1971

Current Professional Accredited Designations and Licenses:

- Chartered Advisor in Philanthropy®, The American College
- Certified Financial Planner®, License #53542, Certified Financial Planner® Board of Standards
- Series 65 Investment Advisor Representative (CRD #2466443)
- Life and Health Insurance License (Alabama, # 417118, Virginia, #518234; expires Sept 2019)

Past Professional Accredited Designations and Licenses:

- Accredited Estate Planner
- Chartered Retirement Plans Specialist
- Virginia Life and Health Insurance Consultant
- Series 7 securities license (May 1994 - October 2012)
- Series 63 security license (May 1994 - October 2012)

Career History:

- **August 2018 - Present:** Self-employed. Founder and principal of Aspire to Give, LLC, a social enterprise dedicated to advancing philanthropy for collective social impact. Greg applies the appreciative inquiry (AI) process for the creation, leveraging, and commercialization of donor-focused philanthropic education and the development and application of technology for social innovation for community development through philanthrocapitalism.

Curriculum Vitae

Gregory W.. Doepke

- **Sept 2000 - Present (End: Dec 2019);** Self-employed. Greg Doepke is the founder and principal of Doepke Financial Advisory, LLC, a Virginia limited liability company that provides contracted comprehensive wealth management, investment advisory and qualified plan consulting services for ACG Advisory Services, Inc. and the Actuarial Consulting Group, Inc of Midlothian, Virginia. With accredited expertise and experience in all facets of retirement income, investments, insurance, estate planning, 401(k) retirement plan consulting, and philanthropic advising, Greg's professional practice helps individuals and business owners develop and implement comprehensive and integrated retirement, estate planning and charitable gifting strategies. Greg also works with philanthropic organizations to empower them to make a greater social impact within their communities.
- **March 1999 - Oct 2012;** Investment Representative, Investors Security Company, CRD # 2331
- **April 1994 - July 1999;** Investment Representative, Jefferson pilot Securities, CRD# 3870
- **June 1976 - Sept 2000:** E. I. DuPont de Nemours, Richmond, Virginia, Control system lead engineer for computer integrated manufacturing (CIM) projects. Greg was totally responsible for leading the design, implementation, and startup of integrated hardware and software control systems for manufacturing and robotic processes in Nomex® paper.
- **June 1971 - June 1976:** U.S. Army, Rank: Captain; Schooling: Airborne, Ranger, and Rotary Wing (Helicopter)

Prior Teaching Experience

- Adjunct Faculty, University of Richmond, School of Professional and Continuing Education, Financial Planning, 2006
- Professional Continuing Education (CE) for CPAs, ACG Advisory Services, Midlothian, Virginia, 2002-2008.

Curriculum Vitae

Gregory W.. Doepke

Presentations and Publications

- Auburn University's Women's Philanthropy Board 2019 Spring Symposium, Forum Moderator, "How Social Impact Investing Can Build Prosperous and Vibrant Communities", April 2019.
- Legacy Arts Magazine, "Community Development Through Grassroots, Place-based Philanthrocapitalism", April 2019.
- Church of the Epiphany, Richmond, Virginia, Congregational Presentation (all services); "Aspirational Giving", Oct 2018.
- International Advisors in Philanthropy Annual Conference, Keynote Panel Presentation (moderator): "Trends and Changes in Community Philanthropy", May 2018.

Professional and Community Engagement

- Co-Chair - Education, Executive Committee of the Women's Philanthropy Board, the flagship division of the Cary Center for the Advancement of Philanthropy and Nonprofit Studies at Auburn University, 2019
- Board of Directors, The International Association of Advisors in Philanthropy, 2018-2019; Member, 2012-2019
- Member (Virginia Chapter), Social Enterprise Alliance; 2013-2019
- Co-Founder and Board of Directors, Auburn Youth Lacrosse League, 2012-2019.
- Co-Founder and Board of Directors, Alabama Lacrosse Assn., 2016-2019
- Board of Directors, Community Foundation of East Alabama, 2009-2011
- Co-Founder; East Alabama Chapter of the National Association of Estate Planners and Councils, 2012-2014; President, 2013
- Board of Directors; Communities in Schools of Chesterfield County, 2002-2008; Board Chair, 2007
- Board of Directors, Chesterfield (Virginia) Education Foundation; 1998-2005