

SMARTER GIVING

SPEAKERS

David S. McKechnie
CLU, Managing Partner
Beaumont Financial Services

A Managing Partner and Chief Investment Officer of Beaumont Financial Services. With over 35 years of experience. He provides comprehensive investment, estate, and retirement planning with a focus on risk management. Outside of his professional occupation, David is involved in many professional associations and philanthropies. These include being a member of the Essex County Estate Planning Council, a member of the National Association of Insurance and Financial Advisors (Boston Chapter), a director on the Board of the North Shore YMCA, the Capital Campaign chair for the Cape Ann YMCA, Chairman of Advisory Board for the Essex County Community Foundation, and an Emeritus Member of Shriners Burns Hospital for Children.

David earned his Bachelor of Arts at the University of Vermont in Economics. He then attended The American College and earned his title of Chartered Life Underwriter. David grew up in Gloucester MA and currently resides there with his wife, Elaine. They share 35 years of marriage. On his free time, David likes to spend time with his wife and two sons - Connor and Ryan, travel, and is an avid golfer.

Ryan J. Swartz
Director and Vice Chair
Trust and Estates Department
McLane Middleton

Areas of Focus:

- *Asset Protection and Wealth Preservation*
- *Estate Planning and Trust*
- *Estate Administration Taxation*

Ryan advises individuals and families regarding various estate planning matters, including estate, gift, income and generation skipping transfer tax strategies. He advises fiduciaries in conservatorship, probate and trust administration matters. Ryan also counsels individuals and business owners regarding business succession planning and various asset protection techniques, including limited liability companies and asset protection trusts. Ryan completed a Judicial Clerkship with the Massachusetts Superior Court (2003-2004). He received his J.D., cum laude, from Suffolk University Law School (2003) and his B.A., cum laude, from the University of Massachusetts, Amherst (1999).

Aria McElhenny
Founder
Cape Ann Development
Warriors

Aria McElhenny is a development and strategy consultant to nonprofits. She has worked in the nonprofit sector for over 25 years in fundraising, communications, and administration, most recently as Executive Director of the Gloucester Education Foundation. Prior to joining GEF, Aria was the Development Director for Backyard Growers in Gloucester. She has consulted with a number of nonprofits in eastern Massachusetts and was formerly the Development Director at Next Step, a Cambridge nonprofit that provides support to teenagers and young adults with life-threatening diseases. She received her Bachelor's degree from the University of California at Santa Cruz, and her Master's degree in education from Harvard University. She lives in downtown Gloucester with her husband John, their three children, and their dog, Bacon.

Stacey Landry

*Director of Strategic Giving
& Gift Planning*
Essex County Community
Foundation

Joined ECCF 2019
Resides in Beverly
978-777-8876 x122

As ECCF's Director of Gift Planning & Advisor Relations, I work with current and prospective fundholders, including individuals, families, corporations and nonprofits, to help them maximize their charitable dollars. I also work with professional advisors to help ensure their clients meet their philanthropic goals.

Prior to joining ECCF in 2019, I built my career on creating genuine relationships with donors at The Possible Project in Cambridge, the Rocky Mountain Children's Health Foundation in Colorado and as co-founder of the Rocky Mountain MicroFinance Institute in Denver. Making authentic connections is an essential part of my role here at ECCF. I am inspired by the sense of unity that is born from collaboration. "If you have come here to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let's work together." This quote reminds me of that connection.

When I'm not working, I love exploring the great outdoors with my family. We live with enthusiasm and gratitude for the adventures we find in everyday life. With a goal to travel to many new places, you'll find me equally as happy connecting with our community by volunteering, visiting area sights and supporting local businesses. I love calling Essex County home.

Jennifer Mayo

*Assistant Director of Gift
Planning & Advisor Relations*
Essex County Community
Foundation

Joined ECCF 2021
Resides in Beverly
978-777-8876 x135

ECCF's focus on community is one of the many things that brought me to the foundation. I have personally experienced the impact that people can have when they come together and I really wanted to bring that idea of collective action into my everyday life and use the skills from my many years in the financial services industry for the common good.

As ECCF's Assistant Director of Gift Planning and Advisor Relations, I focus on building strong relationships with area professional advisors, who play a key role in expanding support for the region's nonprofit organizations and collaborative efforts to tackle systemic social challenges. I also provide charitable gift planning and support to Essex County donors as they make decisions about their philanthropic giving and consider a donor advised fund with ECCF.

I started my career in finance at Goldman Sachs in New York City working in both investment banking and private equity out of the New York and London offices. Upon returning to the North Shore, I began my own consulting firm providing strategic advice to small local businesses. I also serve as an adjunct professor of business at Endicott College, where I teach courses in personal finance and business strategy.

In my spare time, I love to be outdoors and near the water. I was born and raised in Beverly, and although I've lived in places like New York and London, I am a Beverly townie at heart. There is a real sense of community spirit here, which is one of the many reasons my husband and I chose to raise our family here in Essex County.