

Alabama nonprofit expands with new office, new leadership and plans to go national



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Alabama Family Trust, a pooled special-needs nonprofit 501(c)3 trust established by the state in 1994 to invest and protect assets of persons with disabilities, is growing with a new executive team, a new office in Vestavia and future plans to expand trust offerings nationwide to families with special needs.

AFT's planned expansion outside of Alabama is expected to begin by the end of 2016.

AFT, which operated on the campus of UCP of Greater Birmingham for more than six years, branched out recently to its new office in the Berry Building on Columbiana Road in Vestavia Hills. It recently held an open house in March where community leaders, chamber members, nonprofit and health care professionals, area judges, elder law attorneys, corporate executives and AFT partner, BancorpSouth, toured the new headquarters during the ribbon cutting ceremony.

The Alabama Family Trust funds are invested at BancorpSouth Asset Management and Trust, typically by the family of those with special needs to cover costs above what is provided through core governmental benefits, such as Medicaid and SSI, and to give them the financial ability to improve their overall quality of life.

AFT has 627 active trusts with a market value of \$19.3 million as of March 31, 2016 with the opportunity to invest in one of nine investment strategy funds with BancorpSouth. All trusts are actively managed or index-based. The minimum cost to set up a trust at AFT is \$1,500. The average trust at AFT is \$31,000.

In 2014, AFT board members appointed a new executive team. Melanie Bradford, with extensive trust and elder care law expertise, was named Executive Director, and Doug Marshall was named CFO and Chief Taxation Officer. Shannon Brubaker was named Chief Administrative Officer in 2015.

This week, Marshall was named Director of Community Relations for AFT, and Lesley Byars was hired as Chief Taxation Officer.

Bradford said AFT plans to expand its reach to offer special needs trusts to more clients in Alabama and soon across the country that is unique to the Birmingham based nonprofit.

"AFT is truly a special organization, perhaps the best kept secret in Alabama because we only serve those with special needs," Bradford said. "In 2014, the Alabama legislature passed a state statute that allows AFT to expand nationally, making our nonprofit one of only a few trust services in the country with such national capability. I'm honored to be a part of a nonprofit like the Alabama Family Trust led by a dedicated Board that volunteers their time to serve. Our board focuses on and is compassionate about offering families with disabilities a progressive way to financially support their loved ones."

AFT's growth is strategic and well planned. It has also begun conversations with private and nonprofit entities to form new relationships and forge new joint ventures. In addition, AFT has taken key progressive steps by building partnerships with Birmingham companies and nonprofit organizations. AFT, for example, offers education and training to Alabama based clients of American Behavioral.

AFT has also begun working with the Exceptional Foundation and KultureCity to assist families of their clients with disabilities to better understand the complexities and benefits of establishing a special needs trust.

"We needed an organization like AFT to work with our special needs families because of our significant and expected new

growth," said Tricia Kirk, Executive Director of the Exceptional Foundation.

"Alabama Family Trust gives families peace of mind knowing their disabled loved ones will be taken care of financially through sound investing to ensure they have an excellent quality of life," said Julian Maha, founder of KultureCity, a nonprofit organization that serves the autism community nationwide. "We look forward to AFT working with our clients across the country in the future."

AFT had an unusual start. It began operating in a small office in the Alabama Department of Mental Health in Montgomery until UCP of Greater Birmingham Executive Director and AFT Board member, Dr. Gary Edwards, brought AFT to its campus in Birmingham in 2008. The nonprofit incubator he envisioned and implemented was a crucial and invaluable step that allowed AFT to get on solid footing during its formative years.

THE AFT EXECUTIVE TEAM

Melanie Bradford, Executive Director, was appointed to serve as an AFT board member in 2014 and previously served as an advisory board member from 2011-2013. For the past 11 years, Bradford has practiced law exclusively as an elder law and estate planning attorney. She is on the Caregiver Task Force appointed by the Alabama Senate; a member of the Elder Law Section of the Alabama State Bar (past president); and a member of the planning committee for the annual Alabama Elder Law Conference.

Doug Marshall, Chief Financial Officer and Director of Community Relations, previously served as Chief Taxation Officer of the Alabama Family Trust, CFO of UCP of Greater Birmingham, Vice President and Controller of Alagasco with direct responsibility over a substantial part of Operations, and Director of Tax for Energen. He is also a CPA and previously worked for E&Y (formerly Arthur Young).

Shannon Brubaker, Chief Administrative Officer, worked for nearly 10 years with the Jackson County (Alabama) Department of Human Resources as a Child Welfare Worker and was later promoted to a Child Welfare Supervisor before joining AFT. Brubaker is primarily responsible for working with families to set up new trusts and helping facilitate disbursements for the needs of their disabled loved ones.

Lesley Byars, Chief Taxation Officer, has more than 35 years of tax experience that includes Partner with Fiduciary Tax Services, LLP in Florence, Vice President and Trust Tax Manager of Wells Fargo (formerly SouthTrust Bank) in Birmingham, and Vice President and Trust Tax Officer of BBVA Compass in Birmingham (formerly Central Bank of the South). Byars is a CPA and also worked with PriceWaterCoopers (formerly Price Waterhouse) in New York City.

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