



Episode 19: Tax Reform, Endowments, and Donor Strategy

In episode 19, host [Heather Shanahan](#) is joined by [Ed Chaney](#), nonprofit tax attorney at Schell Bray, and [Mike Vogelzang](#), Chief Investment Officer at CAPTRUST, to discuss the potential ripple effects of the latest tax reform proposals on the philanthropic landscape.

With the 2025 expiration of the Tax Cuts and Jobs Act (TCJA) on the horizon and a new tax bill advancing through Congress, Heather, Ed, and Mike unpack what's at stake for private foundations, colleges and universities, and individual donors. From increased excise taxes and asset thresholds to the strategic appeal of donor-advised funds, this timely conversation examines how institutional and individual giving may shift in response and what nonprofit leaders and fiduciaries should be doing now to prepare.

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Resources:

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