

Oklahoma City Estate Planning Council, Inc.

(website: okcepc.org)

Membership Comprised of:
Attorneys, Certified Public Accountants,
Chartered Life Underwriters, Chartered Financial Consultants,
Certified Financial Planners and Trust Officers

2022-2023

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The next Oklahoma City Estate Planning Council meeting will be on:

Thursday, March 9, 2023, 7:30 a.m. – 8:45 a.m. (BREAKFAST MEETING)
Oklahoma City Community Foundation (“OCCF”),
1000 Broadway, Oklahoma City, Oklahoma 73102

We are pleased to present as our speakers, Ameil Shadid, Director of Development for Cristo Rey OKC Catholic High School, and Sarah Guardiola, co-founder of Guardiola Consultants. They will be speaking on Opportunity Scholarship Funds and associated tax incentives.

If you have any suggestions for future speakers and/or topics, please contact a board member listed above.

Please respond to Carol Thompson whether or not you will be attending the meeting. If you are bringing a guest, please provide the guest's name. **Guests are welcomed and encouraged.**

By email: cthompson@hartzoglaw.com
By facsimile: 405.996.3403

A GUEST FEE OF \$30 PER GUEST WILL BE COLLECTED AT THE MEETING.

Please respond no later than Tuesday, March 7, 2023

NOTE: OKCEPC Membership is at the individual level. All nonmember attendees are considered guests and are required to pay the \$30 guest fee. Please note that if a member is unable to attend and sends a nonmember to the meeting, then the \$30 guest fee applies.

Our objective is to promote friendship and cooperation among the members of the Council to the end that the public may be better served in the planning and administration of trusts and estates.

Ameil Shadid

A fundraising, sales and business development executive, Ameil is from Norman, OK. He graduated from The University of Oklahoma with an Undergraduate Degree in Communications and a Masters in Human Relations and Organizational Behavior.

His professional career includes working at OU for 14 years, serving as Executive Director of Development for the Mewbourne College of Earth and Energy before leaving in 2014 to pursue an opportunity with Butch's Rat Hole and Anchor Service, a privately held Oil and Gas Service Company where he focused on Business Development across 8 basins. He currently serves as Director of Development for Cristo Rey OKC Catholic High School.

In addition to his role at Cristo Rey, Ameil owns Mineral Maintenance LLC and is the founder of Dabke Partners. Ameil serves on the board of directors for Pellow Outreach, Teen Recovery Solutions and Norman Optimist Club. Ameil and his wife Kristy have two children, AJ (15) and Sydney (10).



Sarah E. Guardiola

Chief Executive Officer

Opportunity Scholarship Fund

Sarah@OSFkids.org

918-779-5857

Sarah Guardiola, a native of Tulsa, Oklahoma, received her BA from the University of Oklahoma. Following graduation, she spent 10 years studying cultural beliefs and values and their impact on behavior in Central and South America. Her extensive research led her to co-found Guardiola Consulting, which focuses on community building, workforce development, and Hispanic consumer market growth. In 2018, a presentation of her collaborative research on community building was discussed at the United Nations Just Governance forum on Initiative for Change & Human Security in CAUX, Switzerland. In the same year, she was recruited as the CEO of the Skyway Leadership Institute. By working with OU Tulsa's research center, she developed programs focusing on building trust within communities, developing leaders, and implementing the science of HOPE. She gained notoriety and was asked to present their evidence-based, scalable program for restoring social trust between public safety and the community it serves to the U.S. President's Commission on Social Change. As a result of her ability to cultivate partnerships with national & local stakeholders, she was chosen in 2020 to lead the Opportunity Scholarship Fund through significant growth. With over 70 member schools across the state and an asset portfolio of over \$6 million, she currently manages Oklahoma's largest scholarship-granting organization. In 2022 she increased donations to OSF by 38% and together with State Legislators and education advocates, they made history by raising the tax credit cap for the program from \$5 million to \$50 million.

Her passions include reading Agatha Christie novels, traveling, and spending time with her husband Jesse and two children William and Mia.

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