

Wm. David Smith, CAP ®
President and CEO

Dave is the Founder and CEO of Heaton Smith Group, a gift planning consultancy based in Atlanta, Georgia. With nearly 30 years of experience in the nonprofit sector, he has served clients from a wide range of missions, which includes healthcare, academic medicine, higher education, arts and culture, religion, and the independent school sectors – and one Texas-based presidential library and think tank. Dave’s work consists of donors with modest estates as well as high-net-worth individuals and those with private foundations and family offices.

Passionate about gift documentation, Dave has led his firm to become the leader in blended and documented estate gifts in the legacy and charitable estate planning space for an average gift of \$518,000. He has been fortunate to work with institutions such as Memorial Sloan Kettering Cancer Center, Phoenix Children’s Hospital, The George Washington University, Sarah Lawrence College, Atlanta History Center, to name a few.

Dave serves on the boards of The Giving Institute and Giving USA Foundation. He is a member of the Foundation’s resource development and education committees and served on its special planned giving research project committee. In addition, Dave serves on and chairs the Association for Healthcare Philanthropy Affiliate Advisory Council. Dave speaks around the country at local and regional charitable gift planning councils and AFP chapters on matters related to charitable gift planning.

A graduate of the University of Kentucky, he received a degree in Psychology. Dave was a member of the Leadership Atlanta Class of 2000-2001 and earned his Chartered Advisor in Philanthropy®.