

# Suzanne Kadinger, CPA

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## EDUCATION

**Bachelor of Science**, Ball State University, *summa cum laude*, May 1999

**Major:** Accounting, Finance (corporate finance and financial institutions concentrations)

**Honors:** Outstanding Graduating Senior Award presented by the Department of Finance

## CERTIFICATIONS – Certified Public Accountant, February 2004

## PROFESSIONAL EXPERIENCE

### **Old National Wealth Management, Muncie, Indiana**

**Vice President, Trust Administrator**, December 2016-Present

**Assistant Vice President, Trust Administrator**, November 2015-December 2016

- Act as primary fiduciary and administrator for a portfolio of personal trust accounts working with appropriate support teams to ensure the execution of day-to-day account administration.
- Assess client's overall investment, financial, estate, and tax planning needs to assist in achieving specific trust and estate objectives.
- Evaluate discretionary distribution requests in accordance with terms of the governing document.
- Train and supervise all trust staff in the Muncie wealth management office.
- Serve on the corporate-wide Fiduciary Committee and Tax Committee and as Chair of the Exception to Policy Committee.

### **The Community Foundation of Muncie and Delaware County, Inc., Muncie, Indiana**

**Vice President**, January 2014-November 2015

**Program Officer**, June 2005-December 2013

- Directed the distribution function for various endowed funds of the Foundation, including a total annual grantmaking program of over \$2.5 million.
- Researched critical issues in the community and encouraged grant programs to address those issues. Partnered with nonprofit organizations to review organizational needs and plan grant proposal submissions.
- Reviewed grant proposals, including analysis of the financial statements of nonprofit organizations applying for grants. Offered recommendations for funding to the Grants Committee and Board of Directors.
- Oversaw the organization's marketing plan including annual report, newsletters, postcards and social media including coordinating with designers and writers.

### **Whiting & Company LLC, Muncie, Indiana**

**Senior Accountant**, July 1999-May 2005

- Performed audits of banks, credit unions, nonprofit organizations, major hospitals, pension plans and manufacturing companies.
- Prepared individual, corporate, partnership, nonprofit and payroll tax returns. Advised individual tax clients regarding personal tax planning.
- Maintained portfolio tracking and coordinated personal financial planning client presentations for Whiting Financial Advisors LLC.

## ADDITIONAL QUALIFICATIONS AND ACCOMPLISHMENTS

- Working knowledge of federal and state tax law, with particular emphasis on the areas of individual taxation, charitable foundations and nonprofit organizations.
- Asked to partner with the GIFT staff at Indiana Philanthropy Alliance to study community foundation sustainability, especially as it relates to scholarship funds and a foundation's mix of endowment funds. Regarded as an innovator of effective and efficient scholarship and grantmaking processes and often asked to share expertise with other philanthropic foundations across the state through speaking engagements and one-on-one mentoring.
- Secured funding from Ball Brothers Foundation and George and Frances Ball Foundation and partnered with the Bicentennial Nature Trust and the Indiana Department of Natural Resources to establish the Land Conservation Fund and the corresponding grantmaking program. Focused on conserving natural areas in East Central Indiana, the program has been used a model for other counties participating in Indiana's philanthropic bicentennial celebration.
- Named to *M Magazine's* "20 Under 40" for 2015.

## SELECTED VOLUNTEER EXPERIENCE

### **Muncie Ballet, Inc.**, 2003-present

- Work as a volunteer teacher and rehearsal leader. Performed over 100 full-length ballets with the organization and assist with everything from costuming, backstage direction, marketing, to financial planning.

### **4-H Clubs of Delaware County, Inc.**, 2006-present

- Assist with the execution of judging and set-up of the Delaware County 4-H Fair. For the past six years, served as a volunteer leader for the 4-H rabbit project, planning curriculum, conducting workshops and responsible for all aspects of the annual rabbit show and livestock exhibit.

### **Altrusa Club of Muncie**, 2013-present

- Volunteer on various service projects as well as serve on the Service Committee and Nominating Committee.

### **Muncie Altrusa Foundation, Inc.**, 2013-2017

- Served as a Board Member, Chair of the Grants Committee, and Board Chair for the grantmaking and philanthropic arm of the local Altrusa Club.

### **Meals on Wheels of Muncie, Inc.**, 2000-2007

- Served as a Board Member and in the role of Treasurer and Board Chair.

## PROFESSIONAL ASSOCIATIONS AND MEMBERSHIPS

- Graduate of Muncie's Academy for Community Leadership
- Member of East Central Indiana Estate Planning Council