

**David B. Moore**

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- Works for Chapman University
- Not an attorney, CPA or financial advisor so he does not provide legal, tax or investment advice
- Provides helpful information that you should share and discuss further with a qualified advisor
- Always discuss your plans with a qualified advisor who is familiar with your unique situation



With nearly 30 years of professional experience in higher education advancement, David Moore has worked at Chapman University since 2004. Originally serving as the director of alumni and parent relations, he transitioned to the Office of Legacy Planning in 2008. Prior to his promotion, he completed a series of specialized classes on planned giving techniques and the corresponding examinations in an intensive program offered through the American Institute for Philanthropic Studies. Additionally, David earned a master's degree in organizational leadership and a graduate certificate in organizational development through Chapman University in 2009.

Enhanced by his in-depth knowledge of the university, David serves as a philanthropic advisor for the Chapman Family. He helps them to plan thoughtfully in creating a meaningful legacy and investing in the future. He often suggests estate planning tools that can be tax advantaged and offer additional benefits such as lifetime income or wealth transfer. He also oversees the Charles C. Chapman Legacy Society, which recognizes and honors those who have made plans for the future of the university through their estate.

David especially enjoys sharing the Chapman University campus with others, so let him know if you would like a campus tour.

Chapman University has been a sponsor of the It's Your Money and It's Your Estate workshop series for more than a decade. Estate and financial literacy is important. David frequently makes community presentations to support this effort, and he is glad to be a resource for those with questions about charitable giving and planning.