



2325 Dulles Corner Blvd. 6th Floor
Herndon, Virginia 20171
TEL: 703.437.9720
FAX: 703.935.4883
www.sterlingfoundations.com

For Immediate Release:

Sterling Foundation Management announces Evan Unzelman promotion to President.

Herndon, VA – Evan Unzelman has been named President of Sterling Foundation Management, the firm announced today. Unzelman will devote his focus to the continued development and expansion of Sterling’s full suite of philanthropic services, including Private Foundation Administration, Sterling’s Donor Advised Fund, Charitable Remainder Trust and Charitable Lead Trust Administration, Charitable Consulting, and the company’s industry-leading Charitable Remainder Trust (CRT) Program. Simultaneously, the company has announced the appointment of Pete Najera to fill the role of Chief Operating Officer vacated by Unzelman.

“Evan has done a fantastic job for us ever since he joined the firm in 2006. We are fortunate to have him on the team. I can’t think of anyone I’d rather have in this new leadership role,” said Roger Silk, the Stanford Ph.D. co-founder of Sterling who remains in his role as Chief Executive Officer. “Evan’s dedication to serving advisors and clients, his unceasing commitment to improvement, and his high level of technical expertise have been instrumental in helping Sterling become the industry leader that it is today.”

Unzelman was named COO in 2010 as the company’s growth necessitated the establishment of that position. Since then, Unzelman has been responsible for operations as the company has launched an advisor-friendly Donor Advised Fund, has broadened its administrative capabilities, and launched its unique "CRT Rollover" strategy to provide new options to CRT donors. Unzelman is a recognized expert and sought after speaker in the field of charitable planning, and CRTs in particular. He speaks frequently to a variety of audiences including attorneys, accountants and financial advisors, often speaking on the planning, financial, and tax implications of CRTs, and educating advisors on the continually evolving role Foundations, Charitable Trusts and CRTs can play in the estate and wealth planning of affluent clients.

Unzelman holds degrees in finance and economics (summa cum laude) from Pacific Lutheran University in Tacoma, Washington.

About Sterling Foundation Management

Sterling Foundation Management is the oldest national Foundation management firm in the country. Sterling works with a broad range of advisors, clients and high net worth individuals in developing solutions to help them achieve their philanthropic, family, and financial goals through the effective use of private foundations and other charitable planning vehicles and financial services. With services covering the gamut of charitable planning options that advisors are likely to encounter or need, the firm’s services are tailored to each advisor, include charitable planning, establishment and administration of private foundations and Donor Advised Fund accounts, administration of charitable remainder trusts and charitable lead trusts, and advanced planning and implementation of CRT strategies for both new and existing CRT clients.

Contact: Pete Najera, 703.437.9720, PeteNajera@sterlingfoundations.com