MEET THE FACULTY

Lindsey Yates-Grimley is the Executive Director for Gift Planning at the URI Foundation where she oversees the planned giving program. In her role, Lindsey provides strategic leadership to a program that is an important component of the University of Rhode Island’s current $250 million comprehensive campaign. Lindsey has professional and technical expertise in gift planning and a background in finance.

Prior to joining the URI Foundation, she was the Associate Director of Planned Giving at Brown University and one of two directors managing a sophisticated planned giving program that raised more than $55M annually. Lindsey also has twenty years of financial experience including serving as Textron Inc.’s Ethics and Compliance Auditor. In addition to her role at the Foundation, she is also a board member of the Rhode Island Chapter of Partnership for Philanthropic Planning.

Jospeh R. Marion, III, a URI alumnus, is an experienced estate planning attorney and a frequent lecturer for the Boston Bar Association and the Rhode Island Bar Association on estate and long-term care planning issues and land conservation planning. His areas of practice include estate and income tax planning, business succession planning, land conservation planning, long-term care planning, probate and trust administration, special needs planning and real estate conveyancing.

Joseph often counsels clients on estate and income tax savings techniques including the most tax efficient ways which to transfer wealth and family businesses through multiple family generations. He also helps families preserve assets through advance planning for their long-term care needs. He frequently represents trustees and banks in their service as fiduciaries in the settlement of complex estates and beneficiary disputes.