

Special events for existing/prospective clients or donors

Alexander Financial Planning
Asset Management Resources
Atlantic Trust G2G Summit for Families
Beauport Financial Advisors
Bessemer Trust
Boston Foundation
Bove and Langa
Berkshire Taconic Community Foundation
Calgary Community Foundation
Cape Cod Foundation
Coastal Capital
Colby College Legacy Society
Community Foundation of Louisville
Community Foundation of Western Nevada
Community Foundation, Ohio Valley
Daintree Advisors
Dallas Foundation
Davis, Malm, DiAgostino
Delaware Valley Family Business Council
Emerson Investment Management
Essex County Community Foundation
Fairport Asset Management
Hartford Foundation for Public Giving
Hemington Wealth Management
Hospice Alliance of New Hampshire
Hospice of the North Shore and Greater Boston
Intrinsic Wealth
Kahler Financial
Kalamazoo Community Foundation
Lange Financial Group
Luma
Jewish Community Foundation of Greater Hartford
L3 Forum Group
Legacy Planning Partners
Lexington Wealth Management
Margolis and Bloom
McKinley Carter Wealth Managemenet
Milwaukee Community Foundation
Northstar Financial Planning
Parkersburg Community Foundation
People's United Bank
Rebalance360
Renaissance Institute, Notre Dame of Maryland
Rockport Music Legacy Society
Seattle Children's Hospital Foundation

Silver Oak Wealth Advisors
Strategic Wealth Partners
Summit Community Foundation
SYM Financial Advisors
The Financial Advisors
Tiger 21, Boston
UBS
University of Charleston
Vigilant Capital Management
Wacker Wealth Management
Women's Fund of Rhode Island
Wells Fargo Private Wealth Management
Weyerhaeuser Corporation
WH Cornerstone Investments
Whittenberg & Knudsen
WPO Forum Group of southern New Jersey
WPO Bluegrass Chapter, Louisville, KY
YPO Mountain State chapter

Professional development for financial, estate and philanthropic advisors

American Institute of Certified Public Accountants
Anchorage, Alaska Estate Planning Council
Appalachian Philanthropy Institute
Advisors in Philanthropy National Conference
Ballentine Partners
Berkshire Taconic Estate Planning Council
Boston Estate Planning Council
Boston Philanthropic Advisors Roundtable
Chartered Advisors in Philanthropy (CAP), Omaha, NB
Charleston Estate Planning Council
Council on Foundations Family Philanthropy Conference
Elder Care Specialist Certification Training
Everplans
Essex County Estate Planning Council
Financial Planning Association of Northern California, annual conference
Financial Planning Association of Minnesota, annual conference
Financial Planning Association Retreat
Hampden County Estate Planning Council
Legacy Companies
Lincoln Financial Group National conference
Massey Quick
Merrimac Valley Estate Planning Council
Minnesota Planned Giving Council
Money Quotient
National Center for Family Philanthropy
National Association of Personal Financial Advisors, National conference
New Hampshire Estate Planning Council

Susan Turnbull, Personal Legacy Advisors
List of institutions sponsoring a presentation

Current November 2022

North American Management
Partnership for Philanthropic Planning of Rhode Island
People's United Bank
Planned Giving Council of Eastern New York
Planned Giving Group of New England
Premier Resource Group
Purposeful Planning Institute
Seattle Children's Hospital Foundation Planned Giving Conference
Sudden Money Institute
WV Philanthropic Roundtable