

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

Special events for existing/prospective clients or donors

Alexander Financial Planning
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Coastal Capital
Colby College Legacy Society
Community Foundation of Louisville
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Delaware Valley Family Business Council
Emerson Investment Management
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Fairport Asset Management
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Renaissance Institute, Notre Dame of Maryland
Rockport Music Legacy Society
Seattle Children's Hospital Foundation

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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
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 (AIP) National Conference
Ballentine Partners
Berkshire Taconic Estate Planning Council
Boston Estate Planning Council
Boston Philanthropic Advisors Roundtable
Charitable Gift Planners of Kentuckiana
Chartered Advisors in Philanthropy (CAP), Omaha, NB
Charleston WV 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

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National Association of Personal Financial Advisors (NAPFA), National conference
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