



Special events for existing/prospective clients or donors

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Cape Cod Foundation
Coastal Capital
Colby College Legacy Society
Community Foundation of Louisville
Community Foundation of Western Nevada
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Daintree Advisors
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Davidson Wealth Management
Davis, Malm, DiAgostino
Delaware Valley Family Business Council
Emerson Investment Management
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Hartford Foundation for Public Giving
Hemington Wealth Management
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Hospice Alliance of New Hampshire
Hospice of the North Shore and Greater Boston
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L3 Forum Group
Legacy Planning Partners
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People's United Bank
Piscataqua Savings Bank



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

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Renaissance Institute, Notre Dame of Maryland
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Seattle Children's Hospital Foundation
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Strategic Wealth Partners
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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
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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

Advisors in Philanthropy (AIP) National Conference
American Institute of Certified Public Accountants
Anchorage, Alaska Estate Planning Council
Appalachian Philanthropy Institute
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
Hightower Advisors: Advisor Roundtable Series
Hampden County Estate Planning Council
Investments and Wealth Institute Mastery Conference
Legacy Companies



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Lincoln Financial Group National conference
Maine Estate Planning Council
Massey Quick
Merrimac Valley Estate Planning Council
Minnesota Planned Giving Council
Money Quotient
National Center for Family Philanthropy
National Association of Personal Financial Advisors (NAPFA), National conference
New Hampshire Estate Planning Council
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 (PPI)
Seattle Children's Hospital Foundation Planned Giving Conference
Sudden Money Institute
WV Philanthropic Roundtable