



**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  
Davidson Wealth Management  
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  
Hightower Advisors  
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 Managmenet  
Milwaukee Community Foundation  
Northstar Financial Planning  
Parkersburg Community Foundation  
People's United Bank  
Pinnacle Legacy Law



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

Piscataqua Savings Bank  
Rebalance360  
Renaissance Institute, Notre Dame of Maryland  
Rockport Music Legacy Society  
Sage Financial Group  
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  
WH Cornerstone Investments  
Whittenberg & Knudsen  
WPO Forum Group of southern New Jersey  
WPO Bluegrass Chapter, Louisville, KY  
YPO Mountain State chapter  
YPO Women's Forum

**Professional development for financial, estate and philanthropic advisors**

Advisors in Philanthropy (AIP) National Conference  
American Bar Association Real Property Trust and Estates Section  
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



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**List of institutions sponsoring a presentation**

Hightower Advisors: Advisor Roundtable Series  
Hampden County Estate Planning Council  
Investments and Wealth Institute Mastery Conference  
Legacy Companies  
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  
Philadelphia Estate Planning Council  
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