



Special events for existing/prospective clients or donors

Alexander Financial Planning
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Beauport Financial Advisors
Bessemer Trust
Boston Foundation
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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
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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
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Hospice Alliance of New Hampshire
Hospice of the North Shore and Greater Boston
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Kahler Financial
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L3 Forum Group
Legacy Planning Partners
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McKinley Carter Wealth Managmenet
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Parkersburg Community Foundation
People's United Bank
Pinnacle Legacy Law



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

Piscataqua Savings Bank
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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 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



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List of institutions sponsoring a presentation

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