



2017 Events

- November 9-10** **62nd Annual Estate Planning Seminar in Seattle, Washington**
University of Washington School of Law
Estate Planning Council of Seattle
Exhibitor
- November 6-9** **54th Annual Hawaii Tax Institute in Honolulu, HI**
Sponsor
- October 19-22** **The American College of Trust and Estate Counsel**
Fall Meeting in Nashville, TN
Sponsor
- October 5** **Palm Beach Atlantic University, Probate and Pumpnickel**
Sponsor and presentation by Evan Unzelman, Sterling Foundation
Management
- September 22** **Golub Group, First Annual Client Summit in Menlo Park, CA**
Presentation by Evan Unzelman, Sterling Foundation Management
- September 15-17** **The American College of Trust and Estate Counsel**
New Jersey Regional Meeting in Long Branch, NJ
Sponsor
- September 14-17** **The American College of Trust and Estate Counsel**
SE Regional Meeting in Roanoke, VA
Sponsor
- September 8-10** **The American College of Trust and Estate Counsel**
New England Regional Meeting in Lenox, MA
Sponsor
- September 7-8** **Santa Clara University School of Law**
Jerry A. Kasner Estate Planning Symposium
Bronze Sponsor
- July 18-21** **Purposeful Planning Institute's Fusion Collaboration and
Renzvous Event**
Gold Sponsor
- May 16-19** **American Institute of Certified Public Accountants**
Not-for-Profit Industry Conference
Learning Lab Sponsor

- June 15-18** **The American College of Trust and Estate Counsel**
Summer Meeting in Seattle, WA
Sponsor
- June 11-13** **Lion Street Trusted Advisors Conference**
Presentation by Evan Unzelman, Sterling Foundation Management
- June 8-9** **Georgia Federal Tax Conference**
Lunch Sponsor
- May 25** **New York State Society of CPAs FAE Estate Planning Conference**
Sponsor
- May 17** **Palm Beach Atlantic University, Probate and Pumpnickel**
Presentation by Evan Unzelman, Sterling Foundation Management
- May 16** **Atlanta Bar Association Estate Planning and Probate Law Sections**
Presentation by Evan Unzelman, Sterling Foundation Management
- May 2** **Association for Advanced Life Underwriting**
Annual Meeting in Washington, DC
Bronze Sponsor
- April 29** **Children's National, A Vintage Affair**
Balthazar Sponsor
- April 21-23** **The American College of Trust and Estate Counsel**
Heart of America Regional Meeting in Bentonville, AR
Sponsor
- March 8-12** **The American College of Trust and Estate Counsel**
Annual Meeting in Scottsdale, AZ
Sponsor
- January 15** **51st Annual Heckerling Institute on Estate Planning**
Platinum Sponsor