



2011-2014 Events

2014

January 13 **48th Annual Heckerling Institute on Estate Planning in Orlando, FL**
Platinum Sponsor

2013

April 24 **AIP – The International Association of Advisors in Philanthropy**
Conference on Philanthropy in Las Vegas, NV
Breakout Session Sponsor

February 21 **Pinnacle Study Group Meeting in Austin, TX**
Sponsor and presentation by David Murray, Sterling Foundation
Management

January 19 **Forum 400 Annual Meeting in San Antonio, TX**
Sponsor and presentation by David Murray, Sterling Foundation
Management

January 12-16 **47th Annual Heckerling Institute on Estate Planning in Orlando, FL**
Platinum Sponsor and luncheon presentation by Evan Unzelman,
Sterling Foundation Management

2012

November 7 **National Association of Estate Planner and Councils**
49th Annual Conference in Orlando, FL
Sponsor

November 5 **49th Annual Hawaii Tax Institute in Honolulu, HI**
Sponsor

November 1 **University of Washington School of Law/Estate Planning Council**
of Seattle
57th Annual Estate Planning Seminar
Gold Sponsor

October 15 **31st Annual Southern California Tax & Estate Planning Forum**
in San Diego, CA
Luncheon Sponsor

- September 6** **Institute for Divorce Financial Analysts 2012 National Conference**
Sponsor and presentation by David Murray, Sterling Foundation
Management
- July 2** **American Institute of Certified Public Accountants**
2012 Advanced Estate Planning Conference
Exhibitor
- July 18** **2012 Planning for the Generations Symposium**
Exhibitor
- May 22** **Stratos Wealth Partners Annual Meeting**
Sponsor and presentation by David Murray, Sterling Foundation
Management
- May 10** **American Institute of Certified Public Accountants/American
Academy of Matrimonial Lawyers National Conference on Divorce
in Las Vegas, NV**
Silver sponsor and presentation by David Murray, Sterling Foundation
Management
- May 5** **Essex Securities Wealth Opportunities Symposium in Las Vegas, NV**
World Championship Sponsor and presentation by Scott Schoettlin,
Sterling Foundation Management
- April 30** **American Institute of Certified Public Accountants Conference on
Tax Strategies for the High-Income Individual in Las Vegas, NV**
Exhibitor
- April 24** **Lincoln’s Resource Group Annual Meeting in Las Vegas, NV**
Sponsor and presentation by Evan Unzelman, Sterling Foundation
Management
- May 3-5** **Financial Engineering Institute Wealth Blueprinting Symposium**
Presentation by Sterling Foundation Management
- April 19** **AIP – The International Association of Advisors in Philanthropy**
Conference on Philanthropy in Rosemont, IL
Sponsor
- January 14** **Forum 400 Annual Meeting in San Antonio, TX**
Sponsor and presentation by Scott Schoettlin, Sterling Foundation
Management
- January 9** **46th Annual Heckerling Institute on Estate Planning in Orlando, FL**
Platinum Sponsor
- 2011**
- December 5** **48th Annual Hawaii Tax Institute in Honolulu, HI**
Sponsor

- November 16** **National Association of Estate Planner and Councils**
48th Annual Conference in San Antonio, TX
Sponsor
- November 2** **American Association of Attorney-Certified Public Accountants**
Fall Meeting and Education Conference in New York, NY
Sponsor
- October 26** **30th Annual Southern California Tax & Estate Planning Forum
in San Diego, CA**
Luncheon Sponsor and presentation by Evan Unzelman, Sterling
Foundation Management
- October 23** **New York University School of Continuing and Professional Studies**
70th Institute on Federal Taxation
Gold Sponsor
- October 13** **LPL Financial, Advisors' Round Table in Portland, OR**
Sponsor and presentation by Daniel MacDonald, Sterling Foundation
Management
- October 12** **Peak Advisor Alliance, Fall Excell Meeting in Omaha, NE**
Sponsor
- September 19** **46^h Annual Southern Federal Tax Institute in Atlanta, GA**
Exhibitor
- September 15** **37th Annual Notre Dame Tax Institute in South Bend, IN**
Silver Sponsor
- August 16** **Society of Financial Service Professionals**
The Clinic for Advanced Professionals in Philadelphia, PA
Silver sponsor and presentation by Evan Unzelman, Sterling Foundation
Management
- July 20** **2011 Planning for the Generations Symposium in Chicago, IL**
Luncheon Sponsor and presentation by David Murray, Sterling
Foundation Management
- July 18** **American Institute of Certified Public Accountants**
Advanced Estate Planning Conference in Boston, MA
Silver Sponsor and presentation by Evan Unzelman, Sterling Foundation
Management
- May 16** **Investment Management Consultants Association in Las Vegas, NV**
Exhibitor
- May 13** **Financial Planning Association of Dallas-Fort Worth**
Spring Financial Planning Symposium in Frisco, TX
Gold Sponsor and presentation by Evan Unzelman, Sterling Foundation
Management

- May 12** **American Academy of Estate Planning Attorneys**
Conference in New Orleans, LA
Exhibitor
- May 3** **Lincoln's Resource Group Annual Meeting in Las Vegas, NV**
Sponsor and presentation by Evan Unzelman, Sterling Foundation
Management
- April 28** **American Bar Association, Trust and Estate Law 22nd Annual
Spring Symposia**
Gold Sponsor
- April 27** **AIP – The International Association of Advisors in Philanthropy**
Conference on Philanthropy in Rosemont, IL
Sponsor
- April 01** **Peak Alliance, Barrier Breaker Workshop in Washington, DC**
Sponsor
- March 24** **The New York Bar Association**
7th Annual International Estate Planning Institute
Sponsor
- January 15** **The International Forum Annual Meeting**
Presentation by Evan Unzelman, Sterling Foundation Management
- January 10** **45th Annual Heckerling Institute on Estate Planning in Orlando, FL**
Platinum Sponsor