



2016 Events

- November 7-8** **61st Annual Estate Planning Seminar in Seattle, Washington**
University of Washington School of Law
Estate Planning Council of Seattle
Exhibitor
- September 29-30** **Santa Clara University School of Law**
Jerry A. Kasner Estate Planning Symposium
Bronze Sponsor
- September 26-28** **Exponent Philanthropy National Conference in Chicago, IL**
Sponsor and presentation by Ellen Fishbein, Sterling Foundation
Management
- September 19-23** **51st Annual Southern Federal Tax Institute in Atlanta, GA**
Exhibitor
- September 11-13** **PartnersFinancial Idea Forum in Chicago, IL**
Sponsor
- July 28-29** **Purposeful Planning Institute's Renzvous Conference in
Broomfield, CO**
Sponsor
- July 26-27** **Purposeful Planning Institute's Fusion Conference in
Broomfield, CO**
Sponsor
- July 18-20** **American Institute of Certified Public Accountants**
Advanced Estate Planning Conference
Silver Sponsor and presentation
- July 15-18** **Opal Family Office and Private Wealth Management Forum in
Newport, RI**
Sponsor and presentation by Ellen Fishbein, Sterling Foundation
Management
- July 11-13** **Advanced Tax Planning Institute in Carlsbad, CA**
Presentation by Evan Unzelman, Sterling Foundation Management
- June 21-26** **American Academy of Attorneys-CPAs**
Annual Meeting and Education Conference in Maui, HI
Sponsor and presentation by David Murray, Sterling Foundation
Management

June 21-23 **Social Impact Exchange Annual Conference in New York, NY**
Patron Sponsor

June 16-19 **The American College of Trust and Estate Counsel**
Summer Meeting in Boston, MA
Sponsor

June 9-11 **Colorado Bar Association Estate Planning Retreat in Snowmass, CO**
Silver Sponsor

May 26 **New York State Society of CPAs**
FAE Estate Planning Conference in New York, NY
Sponsor

May 24-25 **American Institute of Certified Public Accountants**
Tax Strategies for the High-Income Individual in Las Vegas, NV
Sponsor

May 22-23 **American Institute of Certified Public Accountants**
Private Foundation Summit in Las Vegas, NV
Sponsor

May 9-11 **AIP – The International Association of Advisors in Philanthropy**
Conference on Philanthropy
Premier sponsor and presentations by Ellen Fishbein and David Murray,
Sterling Foundation Management

May 1-3 **American Association of Life Underwriters**
Annual Meeting in Washington, DC
Bronze Sponsor

April 17-20 **Investment Management Consultants Association**
Annual Conference Experience in Orlando, FL
Exhibitor

March 14-18 **The American College of Trust and Estate Counsel**
Annual Meeting in Las Vegas, NV
Sponsor

February 16 **Omaha Estate Planning Council**
Presentation by David Murray, Sterling Foundation Management

February 1 **Lion Street Institute in Austin, TX**
Presentation by Evan Unzelman, Sterling Foundation Management

January 16-19 **Forum 400 Annual Meeting in Bonita Springs, FL**
Exhibitor

January 10-15 **50th Annual Heckerling Institute on Estate Planning in Orlando, FL**
Platinum Sponsor