

2015 Events

December 1-2	Wilson Conferences Family Office Super Summit in Miami, FL Exhibitor
November 16-18	Opal Financial Group Endowment and Foundation Forum in Boston, MA Exhibitor
November 2-4	Advanced Tax Planning Institute in Carlsbad, CA Presentation by Evan Unzelman, Sterling Foundation Management
November 2-3	University of Washington School of Law/Estate Planning Council of Seattle 60th Annual Estate Planning Seminar Exhibitor
October 28-30	Opal Financial Group Family Office and Private Wealth Management Forum – West in Napa, CA Exhibitor
October 22-23	The Tax and Estate Planning Forum in San Diego, CA Presentation by Evan Unzelman, Sterling Foundation Management
October 18-20	New First Financial Resources in Savannah, GA Presentation by Evan Unzelman, Sterling Foundation Management
September 17-20	The American College of Trust and Estate Counsel Regional Meeting in White Sulphur Springs, WV Sponsor
September 17-18	Florida Bankers Association Trust and Wealth Management Conference in Naples, FL Exhibitor
July 20-22	Opal Financial Group Family Office and Private Wealth Management Forum in Newport, RI Exhibitor
June 18-21	The American College of Trust and Estate Counsel Summer Meeting in Quebec, Canada Exhibitor

June 8-10	Advanced Tax Planning Institute in San Diego, CA Presentation by Sterling Foundation Management
May 21-22	National Advisors Trust Conference in Kansas City, MO Presentation by Evan Unzelman, Sterling Foundation Management
May 3-5	Financial Engineering Institute Wealth Blueprinting Symposium Presentation by Sterling Foundation Management
April 27-29	AIP – The International Association of Advisors in Philanthropy Conference on Philanthropy in Chicago, IL Presentation by Sterling Foundation Management
February 3	Forum 400 Annual Meeting in San Antonio, TX Presentation by Sterling Foundation Management
January 12-16	49 th Annual Heckerling Institute on Estate Planning in Orlando, FL Keynote present