



ACTEC 2017 Annual Meeting Sponsor Contacts
The Phoenician – Scottsdale, AZ
March 8-12, 2017

On behalf of ACTEC, I want to extend our sincere thanks to our sponsors for their commitment to making this ACTEC event so successful! ACTEC meetings are designed to inform, entertain, and provide a networking forum for our members as well as our sponsors in a pleasant, comfortable environment. Many of our sponsors have supported ACTEC meetings for over fourteen years and, as we grow in membership, our sponsorship family has grown as well, as we introduce new sponsors each year to the organization. All of your generous contributions enable us to make our vision for our meetings a reality, and no words can express truly how thankful we are for your support

-Cynda C. Ottaway, ACTEC President, 2016-2017

Abbot Downing

Golf Tournament

Denise McLain	Scottsdale, AZ	denise.mcclain@abbotdowning.com	480-905-9248
Michael Lee	Chicago, IL	michael.lee@abbotdowning.com	312-954-4630

Ashar Group – Life Insurance Valuation & Life Settlements

Wi-Fi Support Co-sponsor

Jason Mendelsohn	Orlando, FL	Jason@ashargroup.com	407-782-5614
Jamie Mendelsohn	Orlando, FL	Jamie@ashargroup.com	407-782-3600
Jon Mendelsohn	Orlando, FL	jon@ashargroup.com	407-772-1818

Atlantic Trust

President's Welcome Dinner

Wanda Colburn	Denver, CO	wcolburn@atlantictrust.com	720-221-5006
Ryan Christine Coulson	San Francisco, CA	rcoulson@atlantictrust.com	415-434-6189
Aaron Newland	Newport Beach, CA	anewland@atlantictrust.com	949-660-0834
Judy Saxe	Boston, MA	jsaxe@atlantictrust.com	617-531-6918
Rick Vandenberg	San Francisco, CA	rvandenberg@atlantictrust.com	415-434-6160

Bessemer Trust

Opening Breakfast & Annual Business Meeting and Meeting app co-sponsor

Taylor Heininger	Los Angeles, CA	heininger@bessemer.com	213-892-0900
Teresa Principe	New York, NY	principe@bessemer.com	212-708-9382
Arturo Pedroso	Miami, FL	pedroso@bessemer.com	305-702-7208
David Hills	Houston, TX	hills@bessemer.com	713-803-2849

Bonhams

Reception for New Fellows and First-time attendees; Old Town Scottsdale Walking food tour (3/9) and the Taliesin West and Price House tour with Lunch (3/11)

Leslie Wright	Los Angeles, CA	leslie.wright@bonhams.com	323-436-5408
Sherri Cohen	New York, NY	sherri.cohen@bonhams.com	917-206-1671
Joseph Francaviglia	Los Angeles, CA	joseph.francaviglia@bonhams.com	323-436-5443
Victoria Richardson	San Francisco, CA	victoria.richardson@bonhams.com	415-503-3207
Celeste Smith	San Francisco, CA	celeste.smith@bonhams.com	415-503-3214



ACTEC 2017 Annual Meeting Sponsor Contacts
The Phoenician – Scottsdale, AZ
March 8-12, 2017

Christie's

Board of Regents, Past Presidents, State Chairs Reception & Dinner

Bonnie Brennan	New York, NY	bbrennan@christies.com	212-641-3629
Tash Perrin	New York, NY	tperrin@christies.com	212-636-2058
Rita Boyle	Beverly Hills, CA	rboyle@christies.com	310-385-2654
Steven Zick	Chicago, IL	szick@christies.com	312-787-2765
Joanna Ostrem	New York, NY	jostrem@christies.com	212-468-7147

Citi Private Bank

Brochure Printing & Mailing

Lee Garsson	San Francisco, CA	lee.garsson@citi.com	415-627-6026
Elena Mortemore	New Providence, Bahamas	elena.maria.mortemore@citi.com	242-302-8702
Peter J. Randazzo	Sioux Falls, SD	peter.j.randazzo@citi.com	605-731-3968
Charles Schultz	Los Angeles, CA	charles.a.shultz@citi.com	213-239-2028
Adam von Poblitz	New York, NY	adam.vonpoblitz@citi.com	212-783-6310

Deloitte

WiFi Service co-sponsor

David Eckstein	San Francisco, CA	deckstein@deloitte.com	415-783-6812
Thomas Berg	San Francisco, CA	thomasberg@deloitte.com	415-783-6816

Empire Valuation Consultants

President's Welcome Dinner co-sponsor

Hugh Woodside	Rochester, NY	hwoodside@empireval.com	585-475-9260
Chuck Coyne	West Hartford, CT	ccoyn@empireval.com	860-233-6552
Kevin Kane	Rochester, NY	kkane@empireval.com	585-475-9260
Rich Hayes	New York, NY	rhayes@empireval.com	212-714-0122
Scott Nammacher	New York, NY	scottn@empireval.com	212-714-0122

Fidelity Charitable

Laptop Power Support

Daniel Tarsha	Dallas, TX	daniel.tarsha@fmr.com	919-458-7374
Tony Oommen	Chicago, IL	tony.oommen@fmr.com	919-458-7374

Fiduciary Trust Company International

Trachtman Lecture

Ellen Kratzer	New York, NY	ekratzer@ftci.com	212-632-3228
Emily Dreas	New York, NY	Emily.Dreas@ftci.com	212-632-3059
Arturo Giacosa	Coral Gables, FL	agiacosa@ftci.com	305-349-2364
Alexander Pastor	San Mateo, CA	APastor@ftci.com	650-312-2271
Lisa Marcus	New York, NY	lmarcus@ftci.com	212-632-3218



ACTEC 2017 Annual Meeting Sponsor Contacts
The Phoenician – Scottsdale, AZ
March 8-12, 2017

Glenmede

After Hours Receptions Co-sponsor

Laura LaRosa	Philadelphia, PA	Laura.Larosa@glenmede.com	215-419-6027
Lee Miller	New York, NY	lee.miller@glenmede.com	212-328-7331
Geoff Rogers	Wilmington, DE	geoff.rogers@glenmede.com	302-661-4554
Lisa Whitcomb	Philadelphia, PA	lisa.whitcomb@glenmede.com	215-419-6683
Chip Wilson	Philadelphia, PA	chip.wilson@glenmede.com	215-419-6996

ITM TwentyFirst

Kayaking tour (3/9) and Craft Beer Tour

Leon Wessels	Cedar Falls, IA	lwessels@itm21st.com	319-290-6123
John Barkhurst	Cedar Falls, IA	jbarkhurst@itm21st.com	319-553-6229

Leslie Hindman Auctioneers

Meeting App Co-sponsor

Molly Gron	Chicago, IL	mollygron@lesliehindman.com	312-334-4235
Maron Hindman	Denver, CO	maron@lesliehindman.com	303-825-1855
Logan Browning	Scottsdale, AZ	loganbrowning@lesliehindman.com	520-465-4067

Life Audit Professionals, LLC

Books After Breakfast and the Celebrity Chef Cooking Demo (3/9)

Joe Gitto	Boca Raton, FL	jgitto@mylifeaudit.com	561-948-2429
Richard Newman	Boca Raton, FL	rnewman@mylifeaudit.com	561-948-2421

Lifespring Financial, Inc.

Mountain Rappelling (3/9) and ATV Tour (3/11)

Stewart Hescheles	Paramus, NJ	stewart@lifespringfinancial.com	201-843-7700
Ador Lazar	Aventura, FL	ador@lifespringfinancial.com	786-923-0035

Northern Trust

Committee Reception & Dinner

Hugh Magill (<i>Fellow</i>)	Chicago, IL	rhm1@ntrs.com	312-630-8157
Ann Marsh	Austin, TX	avm2@ntrs.com	512-867-6320
Mike Muttart	Newport Beach, CA	vmm5@ntrs.com	949-717-5545
Denise Riley	San Francisco, CA	dr132@ntrs.com	415-765-4428
Stephen Barber	Phoenix, AZ	srb16@ntrs.com	602-468-2553

Phillips

Spouse & Adult Guest Program and Kayaking (3/11)

Jennifer Jones	New York, NY	jjones@phillips.com	212-940-1272
Blake Koh	Los Angeles, CA	BKoh@phillips.com	323-383-3266
Vivian Pfeiffer	New York, NY	VPfeiffer@phillips.com	212-940-1392

Pluris Valuation Advisors LLC

Musical Instrument Tour

Miranda McCray	New York, NY	mmccray@pluris.com	212-248-4500
Espen Robak	New York, NY	erobak@pluris.com	212-248-4500



ACTEC 2017 Annual Meeting Sponsor Contacts
The Phoenician – Scottsdale, AZ
March 8-12, 2017

Rockefeller & Co.

Saturday Breakfast Buffet

Elizabeth Munson	New York, NY	emunson@rockco.com	212-549-5413
John Pettenati	New York, NY	JPettenati@rockco.com	212-549-5186

Sotheby's

Farewell Reception & 50TH Annual Meeting Dinner

Courtney Christensen	New York, NY	Courtney.christensen@sothebys.com	212-606-7278
Mari-Claudia Jiménez	New York, NY	mc.jimenez@sothebys.com	212-606-7537
Rebecca Lockwood	New York, NY	Rebecca.lockwood@sothebys.com	212-894-1782
Alexandra Shorall	New York, NY	Alexandra.shorall@sothebys.com	212-894-1704
Cassie Spencer	Chicago, IL	Cassie.spencer@sothebys.com	312-475-7910

South Dakota Trust Company LLC

After Hours Receptions Co-sponsor

Pierce McDowell	Sioux Falls, SD	Pierce@sdtrustco.com	605-271-5020
James Paladino	New York, NY	Jpaladino@sdplanco.com	212-642-8377

SRR (Stout Risius Ross)

Coffee Breaks and Beverage Service

Carsten Hoffmann	Irvine, CA	choffmann@srr.com	949-537-2918
Garry Marshall	Houston, TX	gmarshall@srr.com	713-225-9580
Robert Moore	Houston, TX	rmoore@srr.com	713-221-5131
Jeff Risius	Southfield, MI	jrisius@srr.com	248-432-1240
Aaron M. Stumpf	Chicago, IL	astumpf@srr.com	312-752.3358

Sterling Foundation Management LLC

Taliesin West and Price House tour with lunch (3/9) and the Old Town Scottsdale Walking Food Tour (3/11)

David Murray	Vancouver, BC	David.murray@sterling-foundations.com	703-997-4717
Giovanni Kotoriy	Reston, VA	g.kotoriy@sterling-foundations.com	703-437-9720

Willamette Management Associates

Tennis Tournament

Curtis Kimball	Atlanta, GA	crkimball@willamette.com	404-475-2307
Weston Kirk	Atlanta, GA	wckirk@willamette.com	404-475-2308

Wilmington Trust

Seminar and Seminar Materials and New Fellows Hike

Jeff Wolken	Wilmington, DE	jwolken@wilmingtontrust.com	302-651-8192
Tess Pietrucci	Wilmington, DE	tpietrucci@wilmingtontrust.com	302-651-8866
Don DiCarlo, Jr.	Villanova, PA	ddicarlo@wilmingtontrust.com	610-520-1430

As part of the sponsorship program, each sponsor is provided mailing addresses for all pre-registered Fellows and is permitted to send one communication prior to, and another after, the meeting.

This is a complete list of sponsor representatives attending the 2017 ACTEC Annual Meeting. Please take a moment to introduce yourself to our sponsors and thank them for their continued support.

ACTEC 2017 Annual Meeting Sponsor Contacts
The Phoenician – Scottsdale, AZ
March 8-12, 2017

Thanks To Our ACTEC 2017 Annual Meeting Sponsors

The ACTEC 2017 Annual Meeting in Scottsdale, Arizona, is made possible, in part, with the generous support of our sponsors. Please join us in thanking the following sponsors.

ABBOT DOWNING

Abbot Downing
Craig R. Webber Memorial Golf Tournament



Ashar Group – Life Insurance Valuation & Life Settlements
Wifi Support co-sponsor



Atlantic Trust
President's Welcome Dinner



Bessemer Trust
Meeting App co-sponsor and
Opening Breakfast Buffet

Bonhams

Bonhams
New Fellows and First-Time Attendees
Reception, Old Town Scottsdale Walking Food
Tour (Thursday), and Taliesin West and the Price
House Tour with Boxed Picnic Lunch (Saturday)

CHRISTIE'S

Christie's
Board of Regents, Past Presidents, and State
Chairs Reception and Dinner



Citi Private Bank
Annual Meeting Brochure

Deloitte.

Deloitte
Wifi Support co-sponsor



Empire Valuation Consultants
Farewell Reception and 50th Annual Meeting
Gala co-sponsor



Fidelity Charitable
Laptop Power Support



Fiduciary Trust Company International
Annual Joseph Trachtman Lecture



Glenmede
After Hours Receptions co-sponsor



ITM TwentyFirst
Arizona Craft Brewery Tour and Kayak Cruise
(Thursday)



Leslie Hindman Auctioneers
Meeting App co-sponsor



Life Audit Professionals, LLC
Books After Breakfast and
Celebrity Chef Cooking Demonstration



Lifespring Financial, Inc.
ATV Tour and Mountain Rappelling



Northern Trust
Committee Members Reception and Dinner

PHILLIPS

Phillips
Kayak Cruise (Saturday) and Spouse and Adult
Guest Program



Pluris Valuation Advisors LLC
Musical Instrument Tour



Rockefeller & Co.
Breakfast Buffet (Saturday)

Sotheby's

Sotheby's
Farewell Reception and 50th Annual Meeting
Gala co-sponsor



South Dakota Trust Company LLC
After Hours Receptions co-sponsor



SRR
Coffee Breaks and Beverage Service



Sterling Foundation Management, LLC
Old Town Scottsdale Walking Food Tour
(Saturday) and Taliesin West and the Price House
Tour with Boxed Picnic Lunch (Thursday)



Willamette Management Associates

Willamette Management Associates
Tennis Tournament



Wilmington Trust
New Fellows Sunrise Hike and Seminar and
Seminar Materials

As part of the sponsorship program, each sponsor is provided mailing addresses for all pre-registered fellows and is permitted to send one communication prior to, and another after, the meeting. Please take a moment to introduce yourself to our sponsors and thank them for their support. A complete list of the sponsor representatives, including names and contact information, will be included in your on-site registration packet.