

ACTEC 2019 Annual Meeting Sponsor Contacts

Updated March 4, 2019

Ashar Group – Life Settlements & Policy Appraisals

WIFI Support Co-sponsor

Jamie Mendelsohn	Orlando, FL	jamie@ashargroup.com	321-331-1119
Jason Mendelsohn	Orlando, FL	jason@ashargroup.com	321-441-1115

Bank of the West BNP Paribas Wealth Management

Craig R. Webber Golf Tournament with Boxed Lunch

Spencer Gould	Los Angeles, CA	Charles.gould@bankofthewest.com	213-257-1011
Maxine Harris	Los Angeles, CA	Maxine.harris@bankofthewest.com	213-972-0305
Eric Sanderson	Denver, CO	Eric.sanderson@bankofthewest.com	303-817-5710

BDO

Coffee Breaks & Beverage Service

Brooke Anderson	Pittsburgh, PA	btanderson@bdo.com	412-315-2322
Jason Cain	Chicago, IL	jcain@bdo.com	312-730-1435
Sara Dierks	Chicago, IL	sdierks@bdo.com	312-342-2044
Jeff Kane	Grand Rapids, MI	jkane@bdo.com	616-389-8619
John Nuckolls	San Francisco, CA	jnuckolls@bdo.com	415-490-3393
Craig Witcher	Grand Rapids, MI	cwitcher@bdo.com	616-389-8679

Bessemer Trust

Opening Breakfast & Meeting App Co-sponsor

Ron Ferrari	Los Angeles, CA	ferrari@bessemer.com	213-330-8613
Ilka Gregory	New York, NY	gregory@bessemer.com	212-651-1186
Taylor Heining	Los Angeles, CA	heining@bessemer.com	213-330-8566
David Hills	Houston, TX	hills@bessemer.com	713-803-2849
Arturo Pedrosa	Miami, FL	pedrosa@bessemer.com	305-702-7208
Mark Warnken	Naples, FL	warnken@bessemer.com	239-659-5835

BNY Mellon Wealth Management

Books after Breakfast & Spouse/Adult Guest Program

Grace Russak	Los Angeles, CA	Grace.Russak@bnymellon.com	310-551-7688
Stephanie Wheeler	Newport Beach, CA	Stephanie.Wheeler@bnymellon.com	949-253-5004

BOK Financial

Meeting Sponsor

Rosemary Hueser	Kansas City, MO	Rhueser@bokf.com	888-957-6678
Beth Hearn Owens	Houston, TX	BOwens@bokf.com	713-357-2234
Carter Wimberley	Houston, TX	cwimberley@bokf.com	903-769-9320

Bonhams

Reception and Dinner for the Board of Regents, Regents-Elect, Past Presidents, State Chairs, Incoming State Chairs, and Spouses & Guests

Joseph Francaviglia	Los Angeles, CA	joseph.francaviglia@bonhams.com	323-436-5443
Lydia Ganley	Los Angeles, CA	Lydia.ganley@bonhams.com	323-436-5496
Celeste Smith Ibraeva	San Francisco, CA	celeste.smith@bonhams.com	415-503-3214
Victoria Richardson	San Francisco, CA	Victoria.richardson@bonhams.com	415-503-3207
Paul Song	Los Angeles, CA	paul.song@bonhams.com	323-436-5455
Leslie Wright	Los Angeles, CA	leslie.wright@bonhams.com	323-436-5408

Christie's*2018-2019 Committee Reception & Dinner*

Bonnie Brennan	New York, NY	bbrennan@christies.com	212-641-3629
Rita Boyle	Los Angeles, CA	rboyle@christies.com	310-385-2654
Joanna Ostrem	New York, NY	jostrem@christies.com	212-468-7147
Tash Perrin	New York, NY	tperrin@christies.com	212-636-2058
Sarah Vandeweerd	New York, NY	svandeweerd@christies.com	212-636-2389
Steven Zick	Chicago, IL	szick@christies.com	312-787-2765

CIBC Private Wealth Management*Laptop Power Support*

Kyle Edmonds	New York, NY	kyle.edmonds@cibc.com	212-655-7076
Judy Saxe	Boston, MA	Judith.Saxe@cibc.com	617-531-6918

Citi Private Bank*Annual Meeting Brochure*

Bruce Bogue	Sioux Falls, SD	bruce.r.bogue@citi.com	605-731-3957
Lee Garsson	San Francisco, CA	lee.garsson@citi.com	415-627-6026
Lauren Liebes	Beverly Hills, CA	lauren.liebes@citi.com	310-205-3015
Elena Mortemore	Nassau, Bahamas	elena.mortemore@citi.com	242-302-8702
Natalia Murphy	New York, NY	natalia.murphy@citi.com	212-559-3417

Deloitte*Symposium Materials & International Fellows Dinner*

David Eckstein	San Francisco, CA	deckstein@deloitte.com	415-783-6812
Craig Janes	Washington, DC	cjanes@deloitte.com	202-220-2005
Julie Keeney	San Diego, CA	jkeeney@deloitte.com	619-237-6500
Rick Springer	Chicago, IL	rispringer@deloitte.com	312-486-2859

Empire Valuation Consultants*President's Welcome Dinner Co-sponsor*

Richard Hayes	New York, NY	rhayes@empireval.com	212-714-0122
Kevin Kane	Rochester, NY	kkane@empireval.com	585-475-9260
Virginia Lestingi	New York, NY	vlestingi@empireval.com	212-714-0122
Scott Nammacher	New York, NY	scottn@empireval.com	212-714-0122
Hugh Woodside	Rochester, NY	hwoodside@empireval.com	585-475-9260

Fiduciary Trust Company International*Trachtman Lecture*

Kate Freeman	Los Angeles, CA	kate.freeman@ftci.com	213-596-8652
Gerry Joyce	New York, NY	gerry.joyce@ftci.com	212-632-3106
Thomas Kenney	Los Angeles, CA	TKenney1@ftci.com	213-596-8620
Ellen Kratzer	New York, NY	ekratzer@ftci.com	212-632-3228
Paulina Mejia	New York, NY	Paulina.Mejia@ftci.com	212-632-3375
Michael Schiff	Boca Raton, FL	Michael.Schiff@ftci.com	954-847-2205

Gresham Partners LLC*New Fellows and First-Time Attendees Reception*

David Colton	Chicago, IL	dcolton@greshampartners.com	312-960-0224
Wallace L. Head	Chicago, IL	whead@greshampartners.com	312-960-0213
Kim Kamin (<i>Fellow</i>)	Chicago, IL	kkamin@greshampartners.com	312-960-0230

Gurr Johns, Inc.*Meeting Sponsor*

Charlie Horne	New York, NY	chorne@gurrjohns.com	212-486-7373
Lauren Kantor	Los Angeles, CA	lkantor@gurrjohns.com	323-453-6235
Alyssa Quinlan	Chicago, IL	aquinlan@gurrjohns.com	312-888-0904

Heritage Auctions*Thursday & Saturday San Andreas Fault Desert Jeep Tours*

Michelle Castro	Dallas, TX	michellec@ha.com	214-409-1824
Carolyn Mani	Los Angeles, CA	CarolynM@HA.com	310-492-8600
Desiree Pakraven	Los Angeles, CA	desireep@ha.com	

J.P. Morgan Private Bank*Meeting Sponsor*

Carlos Battle	Miami, FL	carlos.a.battle@jpmorgan.com	305-579-9485
Adam Clark	New York, NY	adam.lh.clark@jpmorgan.com	212-464-2500
Carrie Galloway	New York, NY	carrie.galloway@jpmorgan.com	212-464-0450
Mike Harman	Irvine, CA	michael.harman@jpmorgan.com	949-852-4397
Jordan Sprechman	New York, NY	jordan.sprechman@jpmorgan.com	212-464-1383

Lioness Art Partners LLC*Meeting Sponsor*

Deborah Schmidt Robinson	New York, NY	deb@lionessartpartners.com	212-390-1227
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Management Planning, Inc.*Meeting Sponsor*

Tadd Lindsay	Chicago, IL	tlindsay@mpival.com	312-214-2299
Mark Lingerfield	Lawrenceville, NJ	mlingerfield@mpival.com	609-955-5738
Todd Povlich	New York, NY	tpovlich@mpival.com	212-390-8310
Elliot Rotstein	Boston, MA	erotstein@mpival.com	617-892-6078

Northern Trust*Farewell Reception & Dinner Dance Co-sponsor*

Mark Hardtke	Newport Beach, CA	Mah1@ntrs.com	949-717-5523
Hugh Magill (Fellow)	Chicago, IL	Rhm1@ntrs.com	312-630-8157
Susan Merritt	Denver, CO	Sjm13@ntrs.com	303-335-1424
Mike Muttart	Newport Beach, CA	Vmm5@ntrs.com	949-717-5545
Bruce Wojack	Chicago, IL	Bjw14@ntrs.com	847-842-4975

Phillips*El Paseo Food Walking Tour & Mid-century Modern Architecture Tour*

Blake Koh	Los Angeles, CA	bkoh@phillips.com	323-383-3266
Jennifer Jones	New York, NY	jjones@phillips.com	212-940-1272
Lauren Peterson	Chicago, IL	lpeterson@phillips.com	310-922-2841

Silicon Valley Community Foundation*Sunday Breakfast*

Lisa Barr	Mountain View, CA	lbarr@siliconvalleycf.org	650-450-5400
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Sotheby's*Farewell Reception & Dinner Dance Co-sponsor*

Samantha Anderson	New York, NY	Samantha.Anderson@Sothebys.com	212-894-1567
Rebecca Lockwood	New York, NY	Rebecca.Lockwood@Sothebys.com	212-894-1782
Claire Robertiello	New York, NY	Claire.Robertiello@Sothebys.com	212-894-7278
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*President's Welcome Dinner Co-sponsor*

Pierce McDowell	Sioux Falls, SD	pierce@sdtrustco.com	605-338-9170
Jim Paladino	New York, NY	Jpaladino@sdplanco.com	212-642-8377

Sterling Foundation Management LLC*Pickleball Lessons at La Quinta & Friday Desert Jeep Tour*

JC Chang	Reston, VA	jc.chang@sterlingfoundations.com	703-437-9720
Dave Murray	Vancouver, BC	David.murray@sterling-foundations.com	703-997-4717

Stout*Meeting App Co-sponsor*

Carsten Hoffmann	Chicago, IL	astumpf@stoutadvisory.com	312-752-3358
Garry Marshall	Houston, TX	gmarshall@stoutadvisory.com	713-221-5106
Aaron Stumpf	Irvine, CA	choffmann@stoutadvisory.com	949- 537-2918

Valuation Services, Inc.*WIFI Support Co-sponsor*

Jeff Bae	Arlington, VA	jeff@valuationservice.com	571-447-5402
Stephanie Kenny	Arlington, VA	stephanie@valuationservice.com	571-447-5409

Willamette Management Associates*Tennis Tournament*

Curt Kimball	Atlanta, GA	crkimball@willamette.com	404-475-2307
Chad Kirkland	Chicago, IL	cmkirkland@willamette.com	773-399-4339

Wilmington Trust*Professional Seminar Materials*

Adam Bakhash	Los Angeles, CA	abakhash@wilmingtontrust.com	516-423-6217
Kevin Jacobs	Wilmington, DE	kjacobs@wilmingtontrust.com	302-229-1604
Brian Oard	Los Angeles, CA	board@wilmingtontrust.com	805-279-7102
Jeff Wolken	Wilmington, DE	jwolken@wilmingtontrust.com	302-373-7046

WSFS Wealth – Christiana Trust*Thursday Desert Jeep Tour & Palm Springs Breweries Tour*

Todd Hammond	Wilmington, DE	thammond@christianatrust.com	302-888-7740
Tommy Joe Valenzuela	Las Vegas, NV	tvalenzuela@christianatrust.com	702-732-9734

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 continued support.

ACTEC Thanks Our 2019 Annual Meeting Sponsors

The ACTEC 2019 Annual Meeting in La Quinta, California is made possible, in part, with the generous support of our sponsors. Please join us in thanking the following sponsors.

 LIFE SETTLEMENTS POLICY APPRAISALS	Ashar Group - Life Settlements & Policy Appraisals • WiFi Support Co-sponsor	 HERITAGE AUCTIONS <small>THE WORLD'S THIRD LARGEST AUCTION HOUSE</small>	Heritage Auctions • San Andreas Fault Desert Jeep Tour (Thursday and Saturday)
 BANK OF THE WEST BNP PARIBAS WEALTH MANAGEMENT	Bank of the West BNP Paribas Wealth Management • Golf Tournament	J.P.Morgan	J.P. Morgan Private Bank • Meeting Sponsor
 BDO UNITED STATES	BDO • Coffee Breaks and Beverage Service	LIONESS ART PARTNERS, LLC	Lioness Art Partners, LLC • Meeting Sponsor
 BESSEMER TRUST	Bessemer Trust • Opening Breakfast • Meeting App Co-sponsor	 mpi <small>Business Valuation & Advisory</small>	Management Planning, Inc. • Meeting Sponsor
 BNY MELLON WEALTH MANAGEMENT	BNY Mellon Wealth Management • Books After Breakfast • Spouse/Adult Guest Program	 NORTHERN TRUST	Northern Trust • Farewell Reception, Dinner and Gavel Ceremony Co-sponsor
 BOK FINANCIAL	BOK Financial • Meeting Sponsor	PHILLIPS	Phillips • El Paseo Food Walking Tour • Mid-century Modern Architecture Tour
Bonhams	Bonhams • Reception and Dinner for the Board of Regents, Regents-Elect, Past Presidents, State Chairs, Incoming State Chairs and Spouses and Guests	 SILICON VALLEY community foundation*	Silicon Valley Community Foundation • Sunday Breakfast
CHRISTIE'S	Christie's • Committee Members Reception and Dinner	 Sotheby's <small>REAL ESTATE</small>	Sotheby's • Farewell Reception, Dinner and Gavel Ceremony Co-sponsor
 CIBC PRIVATE WEALTH MANAGEMENT	CIBC Private Wealth Management • Laptop Power Support	 SDTC <small>South Dakota Trust Company LLC</small>	South Dakota Trust Company LLC • President's Welcome Dinner Co-Sponsor
 citi <small>Private Bank</small>	Citi Private Bank • Meeting Brochure	 STERLING FOUNDATION MANAGEMENT LLC	Sterling Foundation Management LLC • Pickleball Lessons at La Quinta • Desert Jeep Tour (Friday)
 Deloitte.	Deloitte • Symposium Materials	 STOUT	Stout • Meeting App Co-sponsor
 EMPIRE VALUATION CONSULTANTS	Empire Valuation Consultants • President's Welcome Dinner Co-sponsor	 VSI <small>Valuation Services, Inc.</small>	Valuation Services, Inc. • WiFi Support Co-sponsor
 Fiduciary Trust International	Fiduciary Trust International • Trachtman Lecture	 Willamette Management Associates	Willamette Management Associates • Tennis Tournament
 GRESHAM SUSTAINABLE WEALTH MANAGEMENT	Gresham Partners LLC • New Fellows and First-Time Attendees Reception (by invitation)	 WILMINGTON TRUST	Wilmington Trust • Seminar Materials
 GURR JOHNS <small>est. 1914</small>	Gurr Johns, Inc. • Meeting Sponsor	 WSFS WEALTH CHRISTIANA TRUST*	WSFS Wealth Christiana Trust • Desert Jeep Tour (Thursday) • Palm Springs Breweries Tour

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