

# ACTEC Thanks Our 2016 Summer Meeting Sponsors

The ACTEC 2016 Summer Meeting in Boston, Massachusetts, is made possible, in part, with the generous support of our sponsors. Please take a moment to thank them in person for their support.



**Ashar Group - Life Insurance  
Valuation & Life Settlements**  
Laptop Power Support



**Lifespring Financial, Inc.**  
Homes of Beacon Hill, Private Tour of  
the Isabella Stewart Gardner Museum



**Atlantic Trust**  
John F. Kennedy Presidential Library  
and Museum Reception and Plated  
Dinner (Optional Event)



**Management Planning, Inc.**  
WIFI Support co-sponsor



**BNY Mellon Wealth Management**  
S16 Meeting App



**Northern Trust**  
Speakers, Executive Committee,  
and Committee Chairs Dinner at  
the Boston Public Library



**Bonhams**  
John F. Kennedy Presidential Library  
and Museum Reception and Plated  
Dinner (Optional Event)



**Rockefeller & Co.**  
Coffee Breaks and Beverage Service



**Concord Trust Company**  
Academic World of Cambridge River Tour



**Sotheby's**  
President's Welcome Dinner co-sponsor



**Empire Valuation Consultants**  
Friday Breakfast Buffet



**Sterling Foundation  
Management LLC**  
Boston Red Sox vs. Baltimore Orioles  
(Thursday), Matilda the Musical (Saturday)



**Fiduciary Trust Company  
International**  
President's Welcome Dinner co-sponsor



**Tiedemann Trust Company**  
WIFI Support co-sponsor



**FMV Opinions, Inc.**  
Saturday Breakfast Buffet



**Willamette Management  
Associates**  
Print Kiosk



**Glenmede**  
New Fellows and First-Time  
Attendees Reception



**Wilmington Trust**  
Professional Program Seminar  
& Seminar Materials



**ACTEC 2016 Summer Meeting Sponsor Contacts**  
**The Westin Copley Place – Boston, MA**  
**June 16-19, 2016**

**Ashar Group – Life Insurance Valuation & Life Settlements**

*Laptop Power Support*

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

**Atlantic Trust**

*Saturday Optional Reception & Dinner co-sponsor at the JFK Library*

Sidney Queler	Boston, MA	SQueler@atlantictrust.com	617-531-6954
Judy Saxe	Boston, MA	JSaxe@atlantictrust.com	617-531-6918
Josh Miller	Boston, MA	JMiller@atlantictrust.com	617-531-2549
Mark Kane	Boston, MA	MKane@atlantictrust.com	617-531-2517
Susan Farris	Boston, MA	sfarris@atlantictrust.com	617-261-1096

**BNY Mellon Wealth Management**

*Meeting App*

Pamela Lucina	Chicago, IL	pamela.lucina@bnymellon.com	312-647-2484
John Welsh	Chicago, IL	john.welsh@bnymellon.com	312-647-2484
Phil Tedeschi	Boston, MA	philip.tedeschi@bnymellon.com	617-272-3574
Susan Hartley-Moss	New York, NY	susan.hartley@bnymellon.com	212-495-1784

**Bonhams**

*Saturday Optional Reception & Dinner co-sponsor at the JFK Library*

Sherri Cohen	New York, NY	sherri.cohen@bonhams.com	917-206-1671
Amy Corcoran	Boston, MA	amy.corcoran@bonhams.com	617-742-0909
Victoria Richardson	San Francisco, CA	victoria.richardson@bonhams.com	415-503-3207
Leslie Wright	Los Angeles, CA	leslie.wright@bonhams.com	323-436-5408

**Concord Trust Company**

*Academic World of Cambridge River Tour*

Chip Martin	Concord, NH	cmartin@concordtrustcompany.com	603-219-0264
Andrew Powell	Concord, NH	apowell@concordtrustcompany.com	603-219-0264

**Empire Valuation Consultants**

*Friday Breakfast Buffet*

Greg Sullivan	Rochester, NY	gsullivan@empireval.com	585-475-9260
Hugh Woodside	Rochester, NY	hwoodside@empireval.com	585-475-9260

**Fiduciary Trust Company International**

*President's Welcome Dinner co-sponsor*

Ellen Kratzer	New York, NY	ekratzer@ftci.com	212-632-3228
Steve Brandfield	New York, NY	steven.brandfield@ftci.com	212-632-3226
Kate Freeman	Los Angeles, CA	kate.freeman@ftci.com	213-596-8652
Eliza Rizzo	New York, NY	erizzo@ftci.com	212-632-3373
Gloria Fieldcamp	New York, NY	gfieldcamp@ftci.com	212-632-3000



**ACTEC 2016 Summer Meeting Sponsor Contacts**  
**The Westin Copley Place – Boston, MA**  
**June 16-19, 2016**

**FMV Opinions, Inc.**

*Saturday Breakfast Buffet*

Lance S. Hall	Dallas, TX	lhall@fmv.com	214-592-9641
David M. Eckstein	San Francisco, CA	deckstein@fmv.com	415-288-9500
Miranda McCray	New York, NY	mmccray@fmv.com	212-697-4378

**Glenmede**

*Reception for New Fellows & First-Time Attendees*

Lee Miller	New York, NY	lee.miller@glenmede.com	212-328-7331
Eric Grasinger	New York, NY	eric.grasinger@glenmede.com	212-328-7349

**Lifespring Financial, Inc.**

*Private Tour of the Isabella Gardner Museum and the Homes of Beacon Hill*

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

**Management Planning, Inc.**

*WIFI Service co-sponsor*

Mark Lingerfield	Princeton, NJ	mlingerfield@mpival.com	609-955-5738
Elliot Rotstein	Boston, MA	erotstein@mpival.com	617-892-6078

**Northern Trust**

*Dinner for Speakers, Executive Committee & Committee Chairs at the Boston Public Library*

Christopher D. Perry	Boston, MA	cdp7@ntrs.com	617-235-1835
R. Hugh Magill	Chicago, IL	rhm1@ntrs.com	312-630-8157
Daniel F. Lindley	Chicago, IL	Dfl2@ntrs.com	302-428-8714
David A. Diamond	Wilmington, DE	Dad10@ntrs.com	302-428-8711
Paul Lee	New York, NY	PSL6@ntrs.com	212-339-7212

**Rockefeller & Co.**

*Coffee Breaks and Beverage Service*

John Pettenati	New York, NY	JPettenati@rockco.com	212-549-5186
Elisabeth Mullen	New York, NY	emullen@rockco.com	212-549-5413
Mark Panarese	Boston, MA	mpanarese@rockco.com	617-375-3311
Pamela Murray	Boston, MA	pmurray@rockco.com	617-375-3352

**Sotheby's**

*President's Welcome Dinner co-sponsor*

Lucian Simmons	New York, NY	Lucian.Simmons@Sothebys.com	212-606-7126
C. Hugh Hildesley	New York, NY	Hugh.Hildesley@Sothebys.com	212-606-7579
Courtney Christensen	New York, NY	Courtney.Christensen@Sothebys.com	212-606-7278
Rebecca Lockwood	New York, NY	Rebecca.Lockwood@Sothebys.com	212-894-1782
Lauren Kantor	New York, NY	Lauren.Kantor@Sothebys.com	212-606-7595



**ACTEC 2016 Summer Meeting Sponsor Contacts**  
**The Westin Copley Place – Boston, MA**  
**June 16-19, 2016**

**Sterling Foundation Management LLC**

*Boston Red Sox vs. Baltimore Orioles (Thursday) and Matilda the Musical (Saturday)*

Ellen Fishbein	Reston, VA	Ellen.fishbein@sterling-foundations.com	703-437-9720
Dave Murray	Reston, VA	David.murray@sterling-foundations.com	703-437-9720

**Tiedemann Trust Company**

*WIFI Service co-sponsor*

Andrew Douglass	New York, NY	adouglass@tiedemannwealth.com	212-396-5918
Joseph Melican	Wilmington, DE	jmelican@tiedemanntrust.com	302-830-4170

**Willamette Management Associates**

*Print Kiosk*

Weston Kirk	Atlanta, GA	wckirk@willamette.com	404-475-2308
John Elmore	Atlanta, GA	jeelmore@willamette.com	404-475-2303

**Wilmington Trust**

*Professional Seminar & Materials*

Jeff Wolken	Wilmington, DE	jwolken@wilmingtontrust.com	302-651-8192
Tess Pietrucci	Wilmington, DE	tpietrucci@wilmingtontrust.com	302-651-8866

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 2016 ACTEC Summer Meeting. Please take a moment to introduce yourself to our sponsors and thank them for their continued support.