



Partial Client List

Association of Fundraising Professionals

Institute for Private Investors

The National Center for Family Philanthropy

NMS Management, Family Office Forums

YPO (Young Presidents Organization)

Ameriprise Financial

Charles Schwab Institutional

J.P. Morgan

Laird Norton Tyee

Larson Allen

Lowry Hill Private Asset Management

RBC Wealth Management Group

Regions Bank Private Client Group

TIAA-CREF

UBS Wealth Management Services

U.S. Bank Private Client Group

U.S. Trust

Wells Fargo Private Client Group

Best Buy Corporation-National WOLF (Women's Leadership Forum) Conference

CAIS - California Assoc.of Independent Schools Annual Trustee/School Head Conference

Cargill Corporation

Carlson School of Management – University of Minnesota

Common Ground Speakers Series (consortium of 25 independent schools in the San Francisco Bay Area)

Social Venture Partners

The Divinity School - Yale University

Episcopal Church USA

Evangelical Lutheran Church in America

The Minneapolis, St. Paul, Seattle, Central Indiana, Arizona, Silicon Valley, Greater Atlanta and Denver Community Foundations

Raising Responsible Children & Private Wealth Management Conferences

The University of Minnesota Foundation

Carl & Eloise Pohlad Foundation

Minnesota Planned Giving Council

ISACS – Independent School Association of the Central States

The Sholom Foundation

The Spirit & Place Festival (with Patti Stonesifer, past President of the Bill and Melinda Gates Foundation)

Target Corporation

FOR MORE INFORMATION, VISIT
SHARESAVESPEND.COM



SHARE SAVE SPEND®