

A sample of the groups and organizations we've worked with:

Association of Fundraising Professionals

Institute for Private Investors

The National Center for Family Philanthropy

NMS Management, Family Office Forums

YPO (Young Presidents Organization) International

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)

The Divinity School - Yale University

Episcopal Church USA

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

ISACS - Independent School Association of the Central States

The Shalom 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

