

SAEPC LUNCHEON
04/16/19
PLANNING FOR PUBLIC BENEFITS
KELLEY BENTLEY

RSVPS AS OF TODAY 04/10/19

Attendee Last Name	Attendee First Name	Attendee Company	Attendee Fee Type	Attendee Designations
Acerra	Guy	Ameriprise Financial	Paid Member - September 2018-May 2019	CFP, CLU
Adame	Norma	Frost Bank	Paid Member - September 2018-May 2019	Officer
Ahlenius	Erik	Jefferson Bank Trust	Paid Member - September 2018-May 2019	Attorney, Trust Officer
Amen	Henry		Paid Member - September 2018-May 2019	Attorney
Arismendez	Irene	Frost Bank	Paid Member - September 2018-May 2019	Asst Trust Officer
Ashby	Tammy	Broadway Bank	Paid Member - September 2018-May 2019	CTFA, CAP
Aymes	Gary	Broadway Bank	Paid Member - September 2018-May 2019	Wealth Advisor
Baekr	James	USAA FSB	Paid Member - September 2018-May 2019	CFA
BALMACEDA	SUSAN	BROADWAY BANK	Paid Member - September 2018-May 2019	TRUST OFFICER
Banks	John	Banks & Banks, PC	Paid Member - September 2018-May 2019	Attorney
Bayern	William	Langley & Banack, Inc.	Paid Member - September 2018-May 2019	attorney
Bayern	Art	Langley & Banack	Paid Member - September 2018-May 2019	Attorney
Beecher	Ben	Fidelity Executive Services	Paid Member - September 2018-May 2019	CFP
Belanger	Roberta	Frost Bank	Paid Member - September 2018-May 2019	Trust Officer
Blackmore	Sara	ATKG, LLP	Paid Member - September 2018-May 2019	CPA
Bonilla	Monica	Broadway National Bank	Paid Member - September 2018-May 2019	Attorney
Browder	Vicki	Frost Bank	Paid Member - September 2018-May 2019	
Brown	Spencer	Accountable Aging Care Management	Paid Member - September 2018-May 2019	Aging Life Care Professional
Bruns	George	USAA	Paid Member - September 2018-May 2019	CTFA
Butterbaugh	David	Law Office of David M. Butterbaugh	Paid Member - September 2018-May 2019	Attorney
Carroll	Kalyn	ATKG	Paid Member - September 2018-May 2019	CPA
Clarke	Kristi	Carl Werner & Associates;	Paid Member - September 2018-May 2019	Attorney
Coggins	Charles	Charles E. Coggins, CPA	Paid Member - September 2018-May 2019	CPA
Cooper	Meredith		Paid Member - September 2018-May 2019	
Daubert	Jon	Argent Trust Company	Paid Member - September 2018-May 2019	Attorney, Trust Officer, CWS
Davis	Susan	Edward Jones	Paid Member - September 2018-May 2019	CFP
De Gennaro	Gina	Heinrichs & De Gennaro, PC	Paid Member - September 2018-May 2019	Attorney
DeLeon	Jaime	USAA	Paid Member - September 2018-May 2019	CFP
Doty	Nathan	Frost Bank	Paid Member - September 2018-May 2019	CWS
East	Myron	Caldwell Finlayson & East PLLC	Paid Member - September 2018-May 2019	Attorney
Edelman	Amelia	Porter, Rogers, Dahlman & Gordo	Paid Member - September 2018-May 2019	Attorney

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Edwards	Jennifer	theKFORDgroup	Paid Member - September 2018-May 2019	CPA/CFF, CVA
Espinosa	Roberto	Northwestern Mutual	Paid Member - September 2018-May 2019	Wealth Management Advisor
Ethridge	Leanne	Frost	Paid Member - September 2018-May 2019	Trust Officer
Finck	Kathleen	Frost Bank	Paid Member - September 2018-May 2019	Trust Officer
Flores	Helen	Sage Care Mgmt	Paid Member - September 2018-May 2019	Aging life care manager
ford	kimberly	Heinrichs and De Gennaro PC	Paid Member - September 2018-May 2019	
Ford	Jil	McReynolds & Tye, P.C.	Paid Member - September 2018-May 2019	
Ford	Kimberly	TheKFORDGroup	Paid Member - September 2018-May 2019	CPA, CVA, MAFF
Fox	William	Ameriprise Financial	Paid Member - September 2018-May 2019	CFP, CLU
FROEMSDORF	ELINOR	Ms.	Paid Member - September 2018-May 2019	CLU, ChFC, AEP
Garcia	J Alex	Caldwell East & Finlayson	Paid Member - September 2018-May 2019	Attorney
Giltner	Maggie	Clark Hill Strasburger	Paid Member - September 2018-May 2019	Attorney
Gonzalez	Maira	Duncan, Bressler & Vargas, Inc.	Paid Member - September 2018-May 2019	Attorney
Gonzalez	Maira	Duncan, Bressler & Vargas, Inc.	Paid Member - September 2018-May 2019	Attorney
Guerrero	Lisa	Guerrero Law, PLLC	Paid Member - September 2018-May 2019	Attorney
Guerrero	Ed	Guerrero CPA	Paid Member - September 2018-May 2019	CPA
Gurwitz	Ben	Financial Life Advisors	Paid Member - September 2018-May 2019	CFP(r)
Hairston	David		Paid Member - September 2018-May 2019	
Hannah	John	John R. Hannah & Co., LLP	Paid Member - September 2018-May 2019	CPA
Hardaway	Julie	Broadway Bank	Paid Member - September 2018-May 2019	Attorney/Trust Officer
Harris	Stephanie	S Harris Financial Group, LLC	Paid Member - September 2018-May 2019	CFP
Hetrick	Elizabeth	Broadway Bank	Paid Member - September 2018-May 2019	CTFA
Hetrick	Elizabeth	Broadway Bank	Paid Member - September 2018-May 2019	CTFA
Horton	John	John Horton	Paid Member - September 2018-May 2019	CPA
Howland	Kristine	Trinity University	Paid Member - September 2018-May 2019	
Hughes	Gina	Edward Jones	Paid Member - September 2018-May 2019	
Hughes	Shawn	Broadway Bank	Paid Member - September 2018-May 2019	JD
jackson	charles	langlet-banack	Paid Member - September 2018-May 2019	attorney
Johnson	Bruce	MPJ Business Valuations	Paid Member - September 2018-May 2019	ASA
Jones	Emory	Edward Jones	Paid Member - September 2018-May 2019	CFP
Jones	Dave	Heard & Smith, LLP	Paid Member - September 2018-May 2019	attorney

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King	Brit	New Braunfels Community Found	Paid Member - September 2018-May 2019	
Koplin	Amanda	Koplin Consulting	Paid Member - September 2018-May 2019	LPC
Kveton	Monica	RSM US	Paid Member - September 2018-May 2019	EA
Lacy	Karen	Bank of Texas	Paid Member - September 2018-May 2019	Vice President & Trust Officer
Lamon	David	Reagan Burrus PLLC	Paid Member - September 2018-May 2019	Attorney
lloyd	david	ubs wealth management	Paid Member - September 2018-May 2019	
Loke Moore	Lynnelle	Law Offices of Marcus P. Rogers, P	Paid Member - September 2018-May 2019	Attorney
Lopez	Carlos	USAA	Paid Member - September 2018-May 2019	
Lovell	Matthew	McReynolds & Tye, P.C.	Paid Member - September 2018-May 2019	Attorney
Matonak	Ann Marie	Matonak Law Firm	Membership Fee - New/Renewals (09/18-05/19)	Attorney
McNeil	Carol	USAA	Paid Member - September 2018-May 2019	ChFC
McReynolds	Michael	McReynolds & Tye, P.C.	Guest - Luncheon Fee	
Mendez	Anna	Cadence Bank	Paid Member - September 2018-May 2019	Attorney
Milner	Charlotte		Membership Fee - New/Renewals (09/18-05/19)	CLU, ChFC
Mitchell	Darin	Bank of Texas	Paid Member - September 2018-May 2019	J.D.
Moore	Kevin	i*financial	Paid Member - September 2018-May 2019	CFP
Morris	David	Gately & Morris	Paid Member - September 2018-May 2019	attorney
Netting	Conrad	Jefferson Bank Trust Department	Paid Member - September 2018-May 2019	Attorney
Netting IV	Conrad	Advisor/Trustee	Paid Member - September 2018-May 2019	CPA
Newill	Jesscia	Gardner Law Firm	Paid Member - September 2018-May 2019	Attorney
Norton	Julie		Paid Member - September 2018-May 2019	CPA Retired
Nourie	Kimberly	Financial Life Advisors	Paid Member - September 2018-May 2019	CPA, CFP
Pape	Patrick		Paid Member - September 2018-May 2019	Attorney
PARENTI	PETER	PETER J. PARENTI, A PROF. CORP	Paid Member - September 2018-May 2019	Attorney
Peace	Tyler	Elder Bray & Bankler PC	Paid Member - September 2018-May 2019	Attorney
Ramos	Melanie	USAA	Paid Member - September 2018-May 2019	
Redding	Cameron	Redding Law, PLLC	Paid Member - September 2018-May 2019	Attorney
Ressmann Gray	Ashley	Schoenbaum Curphy & Scanlan, P	Paid Member - September 2018-May 2019	Attorney
Richards	Lynn	Fusion Advisors, Inc.	Paid Member - September 2018-May 2019	CLU, ChFC, MSFS, AEP
Ripper	Marcie	Bell Ripper PLLC	Paid Member - September 2018-May 2019	Attorney
Ritter	Cathy	South Texas Money Management	Paid Member - September 2018-May 2019	
Rodriguez	Lorena	Frost Bank	Paid Member - September 2018-May 2019	

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Rogers	Marcus		Paid Member - September 2018-May 2019	Attorney
Rogers	John	Frost Bank	Paid Member - September 2018-May 2019	CWS, CTFA
Rogers	Marcus		Paid Member - September 2018-May 2019	Attorney
Roos	Marrty	Clark Hill Strasburger	Paid Member - September 2018-May 2019	Attorney
Rubsamen	Rollins	Graystone Consulting	Paid Member - September 2018-May 2019	
Samples	Russell	Wells Fargo Private Bank	Paid Member - September 2018-May 2019	CTFA
Schmidt	Ronald	SCHMIDT & WENZEL PC	Paid Member - September 2018-May 2019	Attorney
Schwartz	Sol	Sol Schwartz & Associates, P.C.	Paid Member - September 2018-May 2019	CPA
Seitz	Casey	Broadway Bank	Paid Member - September 2018-May 2019	JD, CTFA
Serold	Amanda	Oroian, Guest & Little, P.C.	Paid Member - September 2018-May 2019	CPA
Shay	Kevin	Law Office of Kevin P. Shay	Paid Member - September 2018-May 2019	Attorney, CPA
Shipp	Mo	Heinrichs & De Gennaro, P.C.	Paid Member - September 2018-May 2019	Attorney
Smith	Carolyn	Texas Financial Partners	Paid Member - September 2018-May 2019	CPA
Smith	Mark	Heard & Smith, LLP	Paid Member - September 2018-May 2019	attorney
Soat	Richard	BDO	Paid Member - September 2018-May 2019	CPA
Solcher	Whitney	Ulrich Consulting Group	Paid Member - September 2018-May 2019	CFA
Sommer	Eileen	King & Sommer, PLLC	Paid Member - September 2018-May 2019	Attorney
Spellman	David	Money Concepts Capital Copr	Paid Member - September 2018-May 2019	
Spellman	David	Money Concepts	Paid Member - September 2018-May 2019	Financial Advisor
spencer	polly	judge	Paid Member - September 2018-May 2019	
Stahl	Kimberly	FrostBank	Paid Member - September 2018-May 2019	Trust Officer - AVP
Stone	Doug	Ameriprise Financial	Paid Member - September 2018-May 2019	CFP
Strait	Elizabeth	Broadway Bank	Paid Member - September 2018-May 2019	Attorney
Thomas	Nena	Law Offices of Carol Bertsch, P.C.	Guest - Luncheon Fee	Attorney
Thompson	Jeffrey	Bernstein	Paid Member - September 2018-May 2019	
Torres	Manny	Jefferson Bank	Paid Member - September 2018-May 2019	Attorney, Trust Officer
Tottenham	Candace	Jefferson Bank	Paid Member - September 2018-May 2019	CFIRS
Trevino	Ernest	Wells Fargo Advisors	Paid Member - September 2018-May 2019	CFP
Trevino	Rachel	Frost Bank	Paid Member - September 2018-May 2019	
Trimble	Tom	Thomas A. Trimble, CPA	Paid Member - September 2018-May 2019	CPA
Tye	Richard	McReynolds & Tye, P.C.	Paid Member - September 2018-May 2019	Attorney
Valencia	Marco	Jefferson Bank Trust	Paid Member - September 2018-May 2019	Trust Officer

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Valenti	Nick	Platinum Wealth Solutions of Tex	Paid Member - September 2018-May 2019	CFP, CLU, ChFC, AIF
Valenti	Nick	Platinum Wealth Solutions of Tex	Paid Member - September 2018-May 2019	CFP
Vargas	Patty	Duncan, Bressler & Vargas, Inc.	Paid Member - September 2018-May 2019	Attorney
Villarreal	Aleida	Law Office of Aleida A. Villarreal	Paid Member - September 2018-May 2019	Attorney
Voeller	Jim	Voeller Law Firm	Paid Member - September 2018-May 2019	Attorney
Warren	Mike	Mike Warren Law Firm	Paid Member - September 2018-May 2019	Attorney
Weisinger	Charles	Weisinger Law Firm	Paid Member - September 2018-May 2019	Estate Planning Attorney
west	david	dykema	Paid Member - September 2018-May 2019	atty
Wheless	Jay	Texas Financial Partners	Guest - Luncheon Fee	
Wiesner	Susan	Jefferson Bank	Paid Member - September 2018-May 2019	AEP, CTFA
Wilkes	Michael	Madalene Cain Charitable Founda	Paid Member - September 2018-May 2019	Attorney
Winborn	Dawn	Frost	Paid Member - September 2018-May 2019	CIC
Wnuk	Todd	Broadway Bank	Paid Member - September 2018-May 2019	CFP
Wofford	Jo Ann	Frost Bank	Guest - Luncheon Fee	
Wolfe	Corrine	USAA	Paid Member - September 2018-May 2019	
Wolverton	Peter	Gunn Automotive Group	Paid Member - September 2018-May 2019	Attorney
Woo	James	Davidson Troilo Ream & Garza	Paid Member - September 2018-May 2019	Attorney
Wood	Dorothy	Frost	Paid Member - September 2018-May 2019	CFP