

02/15/22

DRAFTING AND INTERPRETING TRUST DISTRIBUTION PROVISIONS THAT: SAY WHAT YOU MEAN AND MEAN WHAT YOU SAY
LESLIE KIEFER AMANN

Attendee Last Name	Attendee First Name	Attendee Company	Attendee Designations
Adams	Janis	Accountable Aging Care Management	RN
Albrecht	Jeff	Sol Schwartz & Associates	CPA
Allison	Bennett	Sol Schwartz & Associates	CPA, CFP
Allums	Tim	KW Heritage - Keller Williams Realty	Seniors Real Estate Specialist
Alvarez	David	PAX Financial Group	CFP
Amen	Henry		Attorney
Badders	Matt	Drought Drought & Bobbitt, LLP	Attorney
Bagg	Kara	Frost Bank	Attorney
Baker	James	USAA Bank	CFA
Balmaceda	Susan	Broadway Bank	Trust Officer
Baumgardner	Cristina	Ridout Barrett	
Belanger	Roberta	Frost Bank	CTFA Trust officer
Boehm	Emily	Boehm & Boehm CPAs	CPA
BOEHM JR	JAMES	BOEHM & BOEHM	CPA
Bonilla	Monica	Broadway National Bank	
Bratcher	Blake	Texas Partners Bank	Vice President
Braulick	Todd	Bank of America Private Bank	JD
Broemsen	Debbie	FROST	CTFA, MPAS
Bruns	George	USAA	
Butterbaugh	David	Law Office of David M. Butterbaugh, P.C.	Attorney
Byers	Catherine	Rosenblatt Law Firm	Attorney
Carlton	Kristin	Exencial Wealth Advisors	CFP
Carroll	Kalyn		
Chaudhry	Shann M.	Shann M. Chaudhry, Esq. Attorney at Law PLLC	Attorney
Clausen	Steven	Hopkins Centrich Winkelman & Drucker, PLLC	Attorney
Cotton	Debbie	Cotton Law Firm	Attorney/Mediator
Countryman	Stephen	Frost Bank	JD
Daubert	Jon	Argent Trust Company	Attorney, Trust Officer, CWS
De Gennaro	Gina	Gina De Gennaro PC	Attorney at Law
E Coggins	Charles	Charles E. Coggins, CPA	CPA
Edwards	Jennifer	theKFORDgroup	CPA/CFF, CVA
Espinosa	Roberto	Northwestern Mutual	CLU, ChFC, CAP, AEP, CFP
ethridge	leanne	frost	cws and cisp
Ewald	Allen	Kreager Mitchell, PLLC	Attorney / CPA
Ferguson	William	Ameriprise Financial	CFP
Finck	Kathleen	Frost Bank	Trust Officer
Ford	Jill	Uhl, Fitzsimons, Burton, Wolff & Rangel, PLLC	Paralegal
Ford	Kimberly	Clark Hill	
Ford	Jill	Uhl, Fitzsimons, Burton, Wolff & Rangel, PLLC	Paralegal
Fox	William	Ameriprise Financial	CFP, CLU
Gerald	Evan	Ulrich Investment Consultants	CFP
Guerrero	Lisa	Guerrero Law, PLLC	Attorney
Guerrero	Ed	Guerrero CPA	CPA
Gurwitz	Ben	Financial Life Advisors	CFP
Hansen	Sarah	Broadway Bank	JD
Hardaway	Julie	Broadway Bank	attorney, TO
Hasting	Howard		Attorney
Heintzman	Storey	Heintzman Law PLLC	Attorney
Hetrick	Elizabeth	Broadway Bank	
Hughes	Shawn	Broadway Bank	JD
Jackson	Jeff	Sol Schwartz & Associates	CPA
jackson	charles	langleybanack	attorney
Kennedy	Kevin	Law Office of Kevin P. Kennedy	Attorney
Kerr	Nancy	nortonrosefulbright	Attorney
King	Janet	King & Sommer, PLLC	Attorney
Klein	Michael	Happy State Trust	ChFC, CLU
Knowlton	Cody	Baptist Health Foundation of San Antonio	
Kreager	Mike	Kreager Mitchell PLLC	Attorney
Lacy	Karen	Bank of Texas	Vice President
Lamon	David	Reagan Burrus PLLC	Attorney
Loke Moore	Lynelle	Loke Moore Law, PLLC	JD, Attorney

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Lovell	Matthew	Clark Hill	Attorney
mackrell	ray	Broadway Bank	CFP
Mendez	Anna	Cadence Bank	J.D.
Milner	Charlotte		CLU, ChFC
Morris	David	Gately & Morris, P.C.	Attorney
Morrison	Catherine	Wells Fargo Advisors, LLC	CFP
Neptune	Selena	BKD	
Netting IV	Conrad	Advisor Trustee	CPA
Nourie	Kim	Financial Life Advisors	CPA, CFP
Oliver	Jim	Calveti Ferguson	CFP, CPA/PFS
Oliver	Carl	Norman & Oliver, P.C.	Lawyer
Ownby	Robert	Broadway Bank	
Pace	Amaris	BKD	
Packard	Alison	Packard Law Firm	attorney
Peace	Tyler	Elder Bray & Bankler PC	Attorney
Pina	Connie	Frost Bank	Trust Officer
Reid	Eric	Frontier Investment Management	CFP
Ressmann-Gray	Ashley	Schoenbaum Curphy & Scanlan, P.C.	Attorney
Robbins	Kelly	Guided Trails Private Wealth Group	CRPC
Rodriguez	Norma	Frost	CWS
RubSAMEN	Rollins	Graystone Consulting	QPFC
Samas	Mark	Weilbacher & Associates, P.C.	CPA
Scheuerman	Hella	Scheuerman Law Firm, PLLC	Attorney
Seitz	Casey	Frost Bank	
Shirley	Sharon	Frost Bank	Senior Vice President
Smith	Mark	Heard & Smith, LLP	attorney
Smith	Andrew	Heard & Smith, LLP	attorney
Smith	Carolyn	C3 Financial Partners	CPA, AEP, CAP
Solcher	Whitney	Ulrich Investment Consultants	CFA
Sosa	Nancy	Cadence Bank	Fiduciary
Stahl	Kimberly	Langley & Banack	Paralegal
Stone	Doug	Kuttin Wealth Management	CFP
Syroney	David	Jefferson Bank	JD, CTFA
Thaxton	Michael	Cuellar and Associates	
Throneberry	Danielle	Shann M. Chaudhry, Esq. Attorney at Law PLLC	
Valenzuela	Elizabeth	Frost Bank	
Villarreal	Aleida	Law Office of Aleida A. Villarreal	Attorney
Voeller	Jim	Voeller Law Firm	Attorney
Walker	Olga	Texas Partners Bank	
Wallis III	Ben	WALLIS LAW, P.C.	Attorney
Webb	Heather	Argent Trust Company	JD, CPA
Weilbacher	Bruce	Weilbacher & Associates	CPA
Werner	Carl	Carl Werner & Associates	Attorney
Wheeldon	Tammy	Broadway Bank	CTFA CAP
Whiute	David	Frost Bank	CPA, Attorney
Wiesner	Susan	American Bank	CTFA, AEP
Wiggans	Melissa	Real Estate Muses	
Wnuk	Todd	Broadway National Bank	CFP, CTFA
Wood	Michelle	Edward Jones	Financial Advisory - AAMS, CFP
Wyckoff	Polly	RSM	CPA