

HOW TO PAY WHEN THE BILL COMES DUE - ESTATE LIQUIDITY IN 2022

Attendee Last Name	Attendee First Name	Attendee Company	Attendee Fee Type	Attendee Designations	I Will Attend:
Ahlenius	Erik	Jefferson Bank Trust	Member (September 2021-May 2022)	Attorney, Trust Officer	In-Person
Albrecht	Jeff	Sol Schwartz & Associates	Member (September 2021-May 2022)	CPA	In-Person
Allums	Tim	KW Heritage - Keller Williams Realty	Member (September 2021-May 2022)	Seniors Real Estate Spe	In-Person
Alvarez	David	PAX Financial Group	Member (September 2021-May 2022)	CFP	In-Person
Amen	Henry	Law Office of Henry J. Amen III	Member (September 2021-May 2022)	Attorney	Via ZOOM
Arnwin	Roger	Jefferson Bank Trust	Member (September 2021-May 2022)	J.D.	In-Person
Augsburger	Robert		Member (September 2021-May 2022)	Attorney	In-Person
Baker	James	USAA FSB	Member (September 2021-May 2022)	CFA	In-Person
Balmaceda	Susan	Broadway Bank	Member (September 2021-May 2022)	Trust Officer	In-Person
Banks	John	Banks & Banks PC	Member (September 2021-May 2022)	Attorney	In-Person
Baumgardner	Cristina	Ridout Barrett	Member (September 2021-May 2022)	CPA	In-Person
Bayern	Art	Langley & Banack	Member (September 2021-May 2022)	Attorney	In-Person
Bonilla	Monica	Broadway National Bank	Member (September 2021-May 2022)		In-Person
Bratcher	Blake	Texas Partners Bank	Member (September 2021-May 2022)	Vice President	In-Person
Braulick	Todd	Bank of America Private Bank	Member (September 2021-May 2022)	JD	In-Person
Brown	Spencer	Accountable Aging Care Management	Member (September 2021-May 2022)	MSG, LNFA, CMC	In-Person
Bruns	George	USAA	Member (September 2021-May 2022)		In-Person
Butterbaugh	David	Law Office of David M. Butterbaugh	Member (September 2021-May 2022)	Attorney	In-Person
Carroll	Kalyn	ATKG	Member (September 2021-May 2022)	CPA	Via ZOOM
Clarke	Kristi	Carl Werner & Associates	Member (September 2021-May 2022)	Attorney	Via ZOOM
Coggins	Charles	Charles E. Coggins, CPA	Member (September 2021-May 2022)	CPA	In-Person
Cotton	Debbie	Cotton Law Firm	Member (September 2021-May 2022)	Attorney-Mediator	In-Person
Countryman	Stephen	Frost Bank	Member (September 2021-May 2022)	JD	In-Person
Daubert	Jon	Argent Trust Company	Member (September 2021-May 2022)	Attorney, Trust Officer	In-Person
Espinosa	Roberto	Northwestern Mutual	Member (September 2021-May 2022)	CLU, ChFC, CAP, AEP, C	In-Person
Ethridge	Leanne	Frost	Member (September 2021-May 2022)	CWS, CISP	In-Person
Ewald	Allen	Kreager Mitchell, PLLC	Member (September 2021-May 2022)	Attorney / CPA	Via ZOOM
Ford	Jill	Uhl, Fitzsimons, Burton, Wolff & Ra	Member (September 2021-May 2022)	Paralegal	Via ZOOM
Ford	Kimberly	Clark Hill	Member (September 2021-May 2022)		In-Person
Fox	William	Ameriprise Financial	Member (September 2021-May 2022)	CFP, CLU	In-Person
Gay	Erica	Jefferson Bank	Member (September 2021-May 2022)	Trust Officer	In-Person
Gill	Alicia	Hornberger Fuller Garza & Cohen	Member (September 2021-May 2022)	CPA	Via ZOOM
Giltner	Maggie	Clark hill	Member (September 2021-May 2022)	attorney	In-Person
Guerrero	Lisa	Guerrero Law, PLLC	Member (September 2021-May 2022)	Attorney	In-Person
Gurwitz	Ben	Financial Life Advisors	Member (September 2021-May 2022)	CFP	In-Person
Hardaway	Julie	Broadway Bank	Member (September 2021-May 2022)	Attorney	Via ZOOM
Harris	Stephanie		Member (September 2021-May 2022)	CFP	In-Person
Hasting	Howard		Member (September 2021-May 2022)	Attorney	In-Person
Hetrick	Elizabeth	Broadway Bank	Member (September 2021-May 2022)		In-Person
Hinojosa Citron	Brittany	Weisinger Law Firm, PLLC	Guest Luncheon Fee		Via ZOOM
Hughes	Shawn	Broadway Bank	Member (September 2021-May 2022)		In-Person
jackson	charles	langleybanack	Member (September 2021-May 2022)	attorney	In-Person
Kennedy	Kevin		Member (September 2021-May 2022)	Attorney	In-Person
King	Janet	King & Sommer, PLLC	Member (September 2021-May 2022)	Attorney	In-Person
Klein	Michael	Happy Trust Company	Member (September 2021-May 2022)	ChFC, CLU	In-Person
Kreager	Michael	Kreager Mitchell PLLC	Member (September 2021-May 2022)	Attorney	In-Person
Lamon	David	Reagan Burrus PLLC	Member (September 2021-May 2022)	Attorney	In-Person
Loke Moore	Lynnelle		Member (September 2021-May 2022)	JD, Attorney	In-Person
mackrell	ray	Broadway Bank	Member (September 2021-May 2022)	CFP	In-Person
Mendez	Anna	Cadence Bank	Member (September 2021-May 2022)	Attorney	In-Person
Mewborne	Michael	Wells Fargo Advisors	Member (September 2021-May 2022)	Financial Advisor / Atto	Via ZOOM
Milner	Charlotte		Member (September 2021-May 2022)	CLU, ChFC	In-Person
Netting IV	Conrad	Advisor Trustee	Member (September 2021-May 2022)	CPA	In-Person
Oliver	Jim	Calvetti Ferguson	Member (September 2021-May 2022)	CPA, CFP	In-Person
Ownby	Robert	Broadway Bank	Member (September 2021-May 2022)		In-Person
Park	Jim	Munroe, Park & Johnson, Inc.	Member (September 2021-May 2022)	Business Appraiser	Via ZOOM
Pina	Melissa	Cadence Bank	Member (September 2021-May 2022)	Attorney	In-Person
Pina	Connie	Frost Bank	Member (September 2021-May 2022)		Via ZOOM
Pleasant	Brittani	B Pleasant Law, PLLC	Guest Luncheon Fee		In-Person
Ramsey	Amber	Ramsey Law, PLLC	Member (September 2021-May 2022)	Attorney	Via ZOOM
Reid	Eric	Frontier Investment Management	Member (September 2021-May 2022)	CFP	In-Person
Ressmann-Gray	Ashley	Schoenbaum Curphy & Scanlan, P.C.	Member (September 2021-May 2022)	Attorney	In-Person
Rodriguez	Lorena	Frost Bank	Member (September 2021-May 2022)		In-Person
Rodriguez	Norma	Frost	Member (September 2021-May 2022)	Trust Officer	In-Person
Roos	Marty	Clark Hill	Member (September 2021-May 2022)	Attorney	In-Person
Samas	Mark	Weilbacher & Associates, P.C.	Member (September 2021-May 2022)	CPA	Via ZOOM
Samples	Russell	Privette Wealth Asset Mgmt	Member (September 2021-May 2022)	CTFA	Via ZOOM
Schauer	Ashlynn	RSM	Guest Luncheon Fee		In-Person
Scheuerman	Hella	Scheuerman Law Firm, PLLC	Member (September 2021-May 2022)	Attorney	In-Person
Schwartz	Sol	Sol Schwartz & Associates	Member (September 2021-May 2022)	CPA	In-Person
Seitz	Casey	Frost Bank	Member (September 2021-May 2022)		Via ZOOM
Shay	Kevin	Law Office of Kevin P. Shay	Member (September 2021-May 2022)	CPA JD	Via ZOOM
Shirley	Sharon	Frost BAnk	Member (September 2021-May 2022)	Trust Officer	In-Person

03/15/22 LUNCHEON

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Sierra	Michael	First Financial Trust & Asset Manag	Member (September 2021-May 2022)	CFP	In-Person
Smith	Mark	Heard & Smith, LLP	Member (September 2021-May 2022)	Attorney	In-Person
Smith	Andrew	Heard & Smith, LLP	Member (September 2021-May 2022)	attorney	In-Person
Soat	Rick	BDO	Member (September 2021-May 2022)	CPA	In-Person
Sosa	Nancy	Cadence Trust & Asset Managemer	Member (September 2021-May 2022)	Senior Vice President	In-Person
Stahl	Kimberly	Langley & Banack	Member (September 2021-May 2022)	Paralegal	In-Person
Syroney	David	Jefferson Bank	Member (September 2021-May 2022)	JD, CTFA	In-Person
Thaxton	Kirk	First Financial Trust & Asset Manag	Guest Luncheon Fee	CFP	In-Person
Thaxton	Michael	Thaxton Global Advisors	Member (September 2021-May 2022)		In-Person
Tottenham	Candace	American Bank	Member (September 2021-May 2022)	CFIRS	In-Person
Velasco	J. Miguel	Harvest Future Financial	Member (September 2021-May 2022)		In-Person
Villarreal	Aleida	Law Office of Aleida A. Villarreal, PL	Member (September 2021-May 2022)	Attorney	In-Person
Voeller	Jim	The Voeller Law Firm	Member (September 2021-May 2022)	Attorney	Via ZOOM
Walker	Peggy	Bank of America	Member (September 2021-May 2022)	CAP	In-Person
Walker	Olga	Texas Partners Bank	Member (September 2021-May 2022)		In-Person
White	David	Frost Bank	Member (September 2021-May 2022)	CPA, Attorney	In-Person
Whitten	Lacey	Law offices of Lacey P. Whitten	Member (September 2021-May 2022)	Attorney	In-Person
Wnuk	Todd	Broadway National Bank	Member (September 2021-May 2022)	CFP, CTFA	In-Person
Wyckoff	Polly	RSM	Member (September 2021-May 2022)	CPA	In-Person