

Date	Host	Sponsor	Location
06/24-27/2018	2018 Million Dollar Round Table Annual Meeting	Million Dollar Round Table	Los Angeles, CA
02/08/2018	PLI Advisor Group W Forum	Protective Life	New Orleans, LA
01/23/2018	2018 FSP Arizona Institute	TBD	Litchfield Park, AZ
11/15/2017	Sudden Money Institute Annual Conference	Sudden Money Institute	Palm Beach Gardens, FL
10/19-22/2017	Advisor Group ConnectEd	Protective Life	Orlando, FL
08/15/2017	PLI – ProEquities	Protective Life	Birmingham, AL
08/05/2017	Widow Empowerment Weekend	Modern Widows Club	Orlando, FL
8/1/2017	PLI – LPL Forum	Protective Life	Boston, MA
7/14/2017	PLI – Cetera Advisor Networks Conference	Protective Life	Washington DC
7/10-11/2017	PLI – CUSO National Sales Conference	Protective Life	San Diego, CA
06/27/2017	PLI – Securities America Connect National Conference	Protective Life	San Diego, CA
06/22/2017	PLI – Connect 2017 Cetera Financial Specialists	Protective Life	Washington DC
5/23/2017	PLI – Cetera Financial Institutions Connect 2017	Protective Life	Washington DC
5/19/2017	PLI – Edward Jones	Protective Life	Birmingham, AL
5/16/2017	NAPFA – Phoenix Rising	NAPFA	Seattle, WA
3/28/2017	PPI	Purposeful Planning Institute	Teleconference Link to audio
3/24/2017	David Holland, CFP	PBS – Daytona State College	TV filming (Broadcast Date TBA) Preview Link
3/11/2017	Our Savior Lutheran Church	Our Savior Lutheran Church & Thrivent Financial	Mesa, AZ
11/14-16/2016	Financial Transitionist Institute	Sudden Money Institute	Palm Beach Gardens, FL
11/05/2016	Protective Life	Protective Life	Austin, TX
10/27/2016	Protective Life	Protective Life	Webinar
10/26/2016	Society of Military Widows	U.S. Army Survivor Outreach Services	Teleconference
10/25/2016	Protective Life - ProEquities	Protective Life	Charlotte, NC
09/29/2016	Women's Money Empowerment Network	Women's Money Empowerment Network	Podcast
9/22/2016	Protective Life	Protective Life	Webinar

08/23/2016	First Protective - Advanced Planning Symposium	Protective Life	New Orleans, LA
08/11/2016	Cetera Advisor Networks – Connection Call	Protective Life	Webinar
07/28/2016	PPI 2016 Rendezvous	Purposeful Planning Institute	Denver, CO
07/04/2016	Chautauqua Professional Women’s Network		Chautauqua, NY
06/29/2016	Financial Experts NETWORK	Financial Experts NETWORK	Webinar
06/21/2016	Investment Advisor Corp. Part 2	Investment Advisor Corp	Webinar
06/07/2016	Investment Advisor Corp. Part 1	Investment Advisor Corp	Webinar
06/07/2016	Interview Nancy Nelson for PPI Teleconference	Purposeful Planning Institute	Webinar LINK
5/18/2016	2016 NAPFA Spring Conference	NAPFA	Phoenix, AZ
04/13/2016	Sweet Financial Services	Sweet Financial Services	Fairmont, MN
03/17/2016	Protective Life	Protective Life	Dayton, OH
03/09/2016	PLI - Edward Jones	Protective Life	Newton, NC
03/03/2016	Real Money with David Holland	Holland Financial/Holland Productions	Webcast LINK
02/11/2016	Protective Life	Protective Life	Webinar
02/10/2016	Society of FSP	Society of FSP	Audio Conference
01/26/2016	Protective Life	Protective Life	Indianapolis, IN
01/12/2016	PPI - Host	Purposeful Planning Institute	Teleconference
01/07/2016	PLI - Edward Jones	Protective Life	San Diego, CA
12/08/2015	PLI - Suntrust	Protective Life	Webinar
11/16/2015	Sudden Money Institute Annual Conference	Sudden Money Institute	Palm Beach Gardens, FL
10/28/2015	Navigation Retirement Group	Navigation Retirement Group	Oro Valley, AZ
10/22/2015	PLI - Edward Jones	Protective Life	Birmingham, AL
10/01/2015	PLI - Edward Jones	Protective Life	Columbus, OH
09/30/2015	Protective Life	Protective Life	Webinar Series 3
09/24/2015	PLI - Edward Jones	Protective Life	Birmingham, AL
09/16/2015	Protective Life	Protective Life	Webinar Series 2
09/02/2015	Protective Life	Protective Life	Webinar Series 1

09/01/2015	PPI Teleconversation	Purposeful Planning Institute	Podcast
08/06/2015	PPI 2015 Rendezvous	Purposeful Planning Institute	Denver, CO
07/20/2015	Chautauqua Professional Women's Network		Chautauqua, NY
07/15/2015	Jordan Cott, Area Life Consultant	Protective Life	Tempe, AZ
07/09/2015	Monroe Township Office of Senior Services	NJP Associates	Monroe Township, NJ
07/08/2015	Raymond James	Protective Life	Orlando, FL
06/18/2015	W. Tedd Oyler, JD	W. Tedd Oyler, JD	Holland, MI
05/28/2015	Ladenburg Thalmann Institute of Women and Finance (LTIWF)	Protective Life	Webinar
05/20/2015	Advantage Insurance Network	Protective Life	Webinar
04/28/2015	Cetera	Protective Life	Nashville, TN
04/27/2015	Jim Sibernagel Interview	Real Wealth Media	Podcast
04/15/2015	Survivor Outreach Services Financial Counselor Army Community Service (ACS)	United States Army call based from Ft Leonard Wood	Teleconference
04/01/2015	The Society of Financial Service Professionals	The Society of Financial Service Professionals	Dallas, TX
03/19/2015	2015 Fusion Collaboration	Purposeful Planning Institute	Orlando, FL
03/17/2015	LifeMark Partners	Protective Life	Webinar
03/09/2015	Christ Church Longboat Key	Tennant Financial Northwestern Mutual Wealth Management Company®	Longboat Key, FL
03/03/2015	2015 W Forum (Advisor Group Women's Conference)	Protective Life	San Diego, CA
02/24/2015	Cherrington Brotsky Conscious Capital	Cherrington Brotsky Conscious Capital	Hilton Head, SC
02/18/2015	Wealth Management Investment Products	US Bancorp Investments, Inc.	Webinar
02/06/2015	Low Load Insurance Academy	Low Load Insurance	Tampa, FL
01/30/2015	Raymond James	Protective Life	Las Vegas, NV
01/28/2015	Alliance of Comprehensive Planners	ACP Planners	Webinar
01/20/2015	Forum 400	Protective Life	Phoenix, AZ
12/08/2014-12/10/2014	Sudden Money Institute Annual Conference	Sudden Money Institute	Palm Beach Gardens, FL
10/30/2014	Griggers, Pierce, Souma & Tatman	Griggers, Pierce, Souma & Tatman	Macon, GA & Warner Robbins, GA
10/23/2014	Cetera Regional	Protective Life	Bethlehem, PA

10/09/2014	PLI - Edward Jones	Protective Life	Birmingham, AL
10/08/2014	SunTrust Bank Estate Planning	SunTrust Bank	Atlanta, GA
10/02/2014	Finn & Rodriguez Wealth Management	Finn & Rodriguez Wealth Management	Newport, RI
09/25/2014	"Aging in Place. It's in Your Future" 2014 Conference		Hendersonville, NC
09/18/2014	Edward Jones	Protective Life	Birmingham, AL
09/17/2014	Chicago Patrolmen's Federal Credit Union	Protective Life	Chicago, IL
09/10/2014	ConnectED 2014	Protective Life	Nashville, TN
09/4/2014	SunTrust Bank	SunTrust Bank	Boca Raton, FL
08/14/2014	Society of Financial Service Professionals – Clinic for Advanced Professionals	Protective Life	Orlando, FL
08/11/2014 08/12/2014	LPL Financial – focus 2014	Protective Life	San Diego, CA
8/04/2014	Chautauqua Professional Women's Network		Chautauqua, NY
07/24/2014 07/25/2014	Women of the ELCA Triennial Gathering	Women of the ELCA	Charlotte, NC
7/22/2014	Successfully Advising Women in Transition	Investment News	Webinar
06/26/2014	Edward Jones	Protective Life	San Antonio, TX
06/19/2014	Protective Life	Protective Life	Chicago, IL
06/10/2014	The Advisor Group Women's Conference	Protective Life	Miami, FL
06/05/2014 06/06/2014	SMI – Certified Financial Transitionist™ Training	Sudden Money Institute	Denver, CO
05/21/2014 05/22/2014	Fisher Investments	Fisher Investments	Camas, WA San Mateo, CA
05/01/2014 05/02/2014	Sudden Money Institute Mid-Year Conference	Sudden Money Institute	Miami, FL
04/29/2014	The Enrichment Group	The Enrichment Group	Miami, FL
04/25/2014	Bedel Financial Consulting, Inc.	Bedel Financial Consulting, Inc.	Indianapolis, IN
04/22/2014	Protective Life	Protective Life	Webinar
04/10/2014	Protective Life	Protective Life	Birmingham, AL
04/04/2014	Luther College Women, Faith & Finance Conference	Luther College	Decorah, IA
04/02/2014	Protective Life – Webinar Series part 3	Protective Life	Webinar
03/19/2014	Protective Life – Webinar Series part 2	Protective Life	Webinar

03/13/2014	PLI - NFP Conference Orlando	Protective Life	Orlando
03/7-9/2014	Camp Widow, National Conference on Widowhood		Tampa, FL
03/05/2014	Protective Life – Webinar Series part 1	Protective Life	Webinar
02/27/2014	Protective Life – Internal staff	Protective Life	Webinar
02/23/2014	ALDE Conference		Jacksonville, FL
02/20/2014 02/21/2014	Community Foundation of Western North Carolina	Davis Financial Planning, LLC	Asheville, NC
02/03/2014 02/04/2014	SMI – Certified Financial Transitionist™ Training	Sudden Money Institute	Palm Beach Gardens, FL
01/31/2014	First Presbyterian Church of Brandon		Brandon, FL
01/27/2014	Sudden Money Institute - Click here to Webcast REPLAY	Sudden Money Institute	Webinar
01/14/2014	Sudden Money Institute	Sudden Money Institute	Webinar
12/10/2013 12/11/2013	Sudden Money Institute Annual Conference		Palm Beach, FL
12/04/2013 12/05/2013	NAPFA iConference	Forbes Conferences	Webinar
11/17/2013	Grace Lutheran Church		Tampa, FL
10/29/2013	Ulster Savings Bank	Cetera Investment Services First Trust Portfolios L.P. Franklin Templeton Distributors	Kingston, NY
10/22/2013	PLI - Edward Jones	Protective Life	Birmingham, AL
10/7/2013	ConnectED 2013	Protective Life	Las Vegas, NV
10/04/2013	LPL Financial	Protective Life	Dallas, TX
09/25/2013	Protective Life	Protective Life	Birmingham, AL
09/12/2013	The Federated Church	Stepping Stone Financial	Chagrin Falls, OH
08/21/2013	The National Association of Personal Financial Advisors (NAPFA)	NAPFA	Webinar
08/19/2013 08/20/2013	LPL Financial	Protective Life	San Diego, CA
08/14/2013	Christ Lutheran Church and School	Thrivent Financial for Lutherans	Costa Mesa, CA
08/07/2013	Survivor Outreach Services (SOS) Financial Counselor (FC) service centers	United States Army	Teleconference
08/02/2013	Protective Life	Protective Life	Boston, MA
07/31/2013	Protective Life	Protective Life	Denver, CO
07/22/2013 07/23/2013	CUSO Financial Services, LP	Protective Life	San Diego, CA

07/15/2013	Chautauqua Professional Women's Network		Chautauqua, NY
07/11/2013	Thrivent Financial for Lutherans	Thrivent Financial for Lutherans	San Jose, CA
06/25/2013	Protective Life	Protective Life	Dallas, TX
06/19/2013 06/20/2013	Protective Life	Protective Life	Cincinnati, OH
6/11/2013	Community Foundations of the Hudson Valley	Taconic Advisors, Inc.	Poughkeepsie, NY
05/20/2013	Retirement Matters Radio	Retirement Matters Radio	Web Radio
05/09/2013	Edward Jones	Protective Life	Birmingham, AL
05/08/2013	Tampa General Hospital	Freedom Financial & Business Planning	Tampa, FL
05/03/2013	Thrivent Financial for Lutherans	Thrivent Financial for Lutherans	Minneapolis, MN
05/02/2013	Thrivent Financial for Lutherans	Thrivent Financial for Lutherans	Fargo, ND
04/27/2013	IBPA Publishing University 2013	TLC Graphics and Narrow Gate Books	Chicago, IL
04/20/2013	Lake Grove Presbyterian Church	Aegis Financial Advisory, LLC	Portland, OR
04/11/2013	NFP	Protective Life	Teleconference
02/13/2013	Apollo Beach Woman's Club		Apollo Beach, FL
02/12/2013	Thrivent Financial for Lutherans	Thrivent Financial for Lutherans	Webinar
01/26/2013	Messiah Lutheran Church		Cape Coral, FL
01/23/2013	Advent Lutheran Church	Rall Capital Management Baldwin & Associates	Melbourne, FL
12/04/2012 - 12/06/2012	Sudden Money Institute	Sudden Money Institute	Palm Beach, FL
11/07/2012	Mastering Your Money radio broadcast with Ed Fulbright, CPA		TBA
11/07/2012	Redeemer Lutheran Church	Financial Life Designs	Winter Park, FL
10/27/2012	St. Dunstan's Episcopal Church	Trinity Financial Planning	Madison, WI
10/04/2012	Alliance of Cambridge Advisors	Alliance of Cambridge Advisors	Detroit, MI
09/19/2012	Tampa General Hospital – Medical Physician Annual Meeting	Freedom Financial & Business Planning Lawrence Financial Planning, LLC	Tampa, FL
09/13/2012	ELCA Foundation	ELCA Foundation	Chicago, IL
09/09/2012	Grace Lutheran Church	Grace Girlfriends	Tampa, FL
09/05/2012	BrightTALK		Webinar

08/29/2012	Thrivent Financial for Lutherans	Thrivent Financial for Lutherans	Webinar
08/06/2012	Garrett Planning Network Annual Retreat	Garrett Planning Network	Denver, CO
08/03/2012 08/04/2012	Lutheran Family Services Rocky Mountain for multiple church events	Lutheran Family Services Rocky Mountain	
08/03/2012	First Luther Church, CO Spring Bethany Lutheran Church, Denver	Pinnacle Financial Concepts, Inc.	Colorado Springs & Cherry Hills
08/04/2012	First Lutheran Church, Longmont	McNary Financial Planning	Longmont
08/04/2012	Redeemer Lutheran Church	A Richer Life Financial Planning	Ft. Collins
08/02/2012	2012 Florida Symposium for Financial Planning Professionals	FPA	Tampa, FL
07/11/2012	Survivor Outreach Services (SOS) Financial Counselor (FC) Financial Forum	United States Army	Teleconference
07/11/2012	More than Money		Radio Program Interview
06/13/2012	Sudden Money Institute	Sudden Money Institute	Webcast
04/13/2012	Luther College 8th Annual Women, Faith & Finance	Thrivent Financial for Lutherans	Decorah, IA
04/9/2012	John Kremer		Podcast Interview
04/03/2012	Robin Craig LIVE Web TV		Web Interview
03/31/2012	Naples United Church of Christ	Bryson Goss, Principal Goss Associates, Inc.	Naples, FL
03/27/2012	Episcopal Church Women's Gathering	Lawrence Financial Planning, LLC	St. Petersburg, FL
03/21/2012	Church Women United Annual Assembly		Fruitland Park, FL
03/13/2012	Women Advisors Forum	SourceMedia	Boca Raton, FL
03/10/2012	American Association of University Women		Sun City, FL
01/28/2012	Grace Lutheran Church		Tampa, FL
01/24/2012	Purposeful Planning Institute		Teleconference
01/17/2012 - 01/19/2012	Community Foundation of Tampa Bay		Tampa, St. Petersburg and Sun City FL
01/16/2012	Homekeepers Television Network Link to view show		Clearwater, FL
12/03/2011	Florida Writer's Association		Tampa
11/16/2011	Retired Clergy Gathering		Orlando, FL
11/12/2011	FBS Women of the ELCA Fall Gathering		Lake Yale, FL
11/07/2011	Thrivent National Sales Conference	Thrivent Financial for Lutherans	Minneapolis, MN

11/03/2011	Community Foundation of Tampa Bay – Professional Advisory Council		Tampa, FL
09/22/2011 09/23/2011	Alliance of Cambridge Advisors Conference		Kansas City, KS
08/24/2011	Dr. Ed Jacobson		“Open Mic” webinar interview
08/12/2011 08/13/2011	Camp Widow, National Conference on Widowhood – leading two different workshops		San Diego, CA
07/14/2011- 07/17/2011	Women of the ELCA National Triennial Gathering with the ELCA Foundation	ELCA Foundation	Spokane, WA
05/06/2011	Florida-Bahamas Synod of the Evangelical Lutheran Church in America & Book Signing		Orlando, FL
05/04/2011	“Aging Well” Older Adult Hostel		Orlando, FL
04/13/2011	Church Women United Annual Assembly		Fruitland Park, FL
04/10/2011	Local Authors Book Signing Fest		Tampa, FL
01/20/2011	Emmanuel Lutheran Church & The Arlington		Naples, FL
11/12/2010 11/13/2010	Florida-Bahamas Synod Women of the ELCA Fall Gathering		Lake Yale, FL
11/10/2010	Florida Retired Lutheran Clergy		Orlando, FL
10/25/2010	U.S. Army Survivor Outreach Services		Ft. Huachuca, AZ
10/23/2010	Alliance of Cambridge Advisors Annual Conference		Scottsdale, AZ
10/20/2010	ELCA Foundation	ELCA Foundation	Chicago, IL
09/19/2010	Grace Lutheran Church		Tampa, FL
09/14/2010	P.E.O. International (Philanthropic Educational Organization)		Tampa, FL
08/18/2010	Voice America Internet talk radio “The Wise and Wary”		Internet talk radio show interview
08/07/2010	Camp Widow, National Conference on Widowhood		San Diego, CA
07/22/2010	Author Margaret Marcuson		Teleconference interview