

02/21/17 LUNCHEON

CONSIDER ESOPS AS AN ESTATE PLAN COMPONENT FOR BUSINESS OWNERS

KELLY O. FINNELL

Attendee Last Name	Attendee First Name	Attendee Company	Attendee
Acerra	Guy	Ameriprise	CLU, CFP
Adame	Norma	Frost Bank	Trust Officer
Ahlenius	Erik	Jefferson Bank	
Alexander	Katy	Vogt Auction	
Alvarez	David	Intercontinental Wealth Advisors	
Ashby	Tammy	Broadway Bank	
Aymes	Gary	Broadway Bank	Trust Officer
Balmaceda	Susan	Broadway Bank	
Bayern	Art	Langley & Banack	Attorney
Belanger	Roberta	Frost Bank	CTFA
Blackmore	Sara	ATKG, LLP	
Bolte	Rosemary	Brehm Havel & Company LLP	Accountant, CPA
Bonilla	Monica	Broadway Bank	Attorney
Braulick	Todd	U.S. Trust, Bank of America Private Wealth	Private Bank Officer
Brell	Mike	Frost Bank	
Brown	Spencer	Accountable Aging Care Management	LNFA, CMC
Browning	Mark	Texas A&M Foundation	CTFA
Brysacz	Matthew	Brysacz Law Firm PLLC	Attorney
Burke	Tracey	theKFORDgroup	Accountant, CPA, CFP
Carlton	Kristin	Exencial Wealth Advisors	
CHAPA	SYLVIA	USAA	

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Clarke	Kristi	Carl A. Werner, PC	Attorney
Coggins	Charles	Charles E. Coggins, CPA	Accountant, CPA
Cordes	Byron	Sage Care Management	
Cornwell	Kim	South Texas Money Management, Ltd.	CFP
Daubert	Jon	Frost Bank	Attorney, Trust Officer, CWS
De Gennaro	Gina	Heinrichs & De Gennaro PC	Attorney
Doty	Nathan	Frost Bank	Trust Officer
Edelman	Amelia	Weisinger Law Firm, PLLC	Attorney
Edwards	Jennifer	theKFORDgroup	CPA, CVA, CFF
Eippert Terry	Debbie	Frost Bank	Trust Officer
Ethridge	Leanne	Frost	Trust Officer
Finck	Kathleen	Frost Bank	Trust Officer
Fiore	Marie	USAA Trust Services	CTFA
ford	kimberly	Heinrichs and De Gennaro, P.C.	Attorney
Ford	Kim	theKFORDgroup	Accountant, CPA, MAFF
Ford	Jill	McReynolds & Tye, P.C.	
Fox	William	Ameriprise Financial	CLU, CFP
Friedman	Jay	Wilkins Finston Friedman Law Group LLP	
FROEMSDORF	ELINOR		CLU, AEP, ChFC
Gill	Alicia	Weaver	

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Giltner	Maggie	PRDG	Attorney
Gorelik	Dana	Wells Fargo	Attorney
Gurwitz, CFP®	Ben	Financial Life Advisors	
Haney	Kimberly	Sage Care Management	
hardaway	julie	broadway bank	
Harris	Stephanie	S Harris Financial Group, LLC	CFP, CDFA (Cert. Divorce Financial
Hasting	Howard		Attorney
HENDRICKS	DANIA	USAA	
Hetrick	ELizabeth	Broadway Bank	
hosack	kristin	USAA	
hughes	shawn	Broadway Bank	
Jones	Dave	Heard & Smith	
Kala	Eric	Northwestern Mutual	CLU, CFP, AEP, ChFC
Kardys	Richard	Frost Bank	Attorney, Trust Officer, CTFA, CWS
Kennedy	Kevin		Attorney
Knowlton	Cody	Baptist Health Foundation of San Antonio	
Kreager	Mike	Kreager Mitchell PLLC	
Lamon	David	Reagan Burrus PLLC	Attorney
LoBasso	Carrie	ATKG	CPA
Longoria	Mary Ann	Frost Bank	Trust Officer
Lopez	Carlos	USAA	
Lovell	Matthew	McReynolds & Tye, P.C.	Attorney

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Mansker	Clay	Mansker Law	Attorney
Matonak	Ann Marie	Matonak Law Firm	Attorney
McNeil	Carol	USAA	
Mewborne	Michael	Wells Fargo Advisors	
Mitchell	Shawn	U. S. Trust, Bank of America Private Wealth	Trust Officer
Moore	Lynnelle	Law Office of Marcus Rogers	
Morris	David	Gately & Morris, P.C.	Attorney
Netting	Conrad	Jefferson Bank Trust Department	Attorney
Newill	Jessica	Gardner Law	
Noll	Dennis	San Antonio Area Foundation	
Oliver	Jim	CalvettiFerguson	CFP, CPA/PFS
Oxford	Brad	Strasburger	Attorney
Palmer	Susan	Frost Bank	Attorney, Trust Officer
Pape	Patrick	Attorney at Law	Attorney
Parenti	Peter		Attorney
Peace	Tyler	Elder Bray & Bankler PC	Attorney
Place	Lori		CPA
Polansky	Edward	Weaver	
Poteet	John	Lange, Poteet & Co., LLP	Accountant, CPA
Rademacher	Kevin	Broadway Bank	
ramos	melanie	usaa	
Ramsey	Amber	Coquat Law Firm	Attorney

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Redding	Cameron	Anna M. Torres & Associates, P.C.	
Richards	Lynn	Fusion Advisors, Inc.	CLU, AEP, ChFC, MSFS
Robb	John	Frost Bank	Trust Officer
Rogers	John	Frost	Trust Officer, CTFA, CWS
Roos	Marty	Strasburger & Price, LLP	Attorney
Rubsamen	Rollins	Graystone Consulting	
Seitz	Casey	Broadway Bank	
Shay	Kevin		CPA
Shipp	Mo	Heinrichs & De Gennaro	Attorney
Shirley	Sharon	Frost Bank	Trust Officer
Smith	Mark	Heard & Smith	Attorney
Soat	Richard	BDO	CPA, ABV, CFF
Sommer	Eileen	King & Sommer, PLLC	Attorney
Stahl	Kimberly	Frost Bank	Trust Officer
Stone	Doug	Ameriprise Financial	CFP
Thompson	Jeffrey	Bernstein	Financial Advisor
TOMKEWITZ	LORIANN	USAA	
Tottenham	Candace	Jefferson Bank Trust	
Tye	Richard	McReynolds & Tye, P.C.	Attorney
Vines	Sarah	Frost Bank	Trust Officer

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Voeller	Jim	The Voeller Law Firm	Attorney, AEP
Voeller	David	The Voeller Law Firm	Attorney
Vogt	Rob	Vogt Auction	
Walker	Phillip	IKOR	CFP
Walker	Peggy	U.S. Trust	CAP
Warren	Mike	Mike Warren, Attorney	
Webb	David	Atlas Retirement Strategies, LLC	
West	David	Dykema	
Wiesner	Susan	Jefferson Bank	Senior Trust Officer
Winborn	Dawn	Wortham Insurance	
Wolverton	Peter	Gunn Automotive Group	Attorney
Wyckoff	Polly		Accountant, CPA
Yelderman	Karl	Lange, Poteet & Co., LLP	Accountant, CPA