

03/21/17 LUNCHEON

FINANCIAL EXPLOITATION - IF IT'S NOT YOUR MONEY, IT'S A CRIME

LISA SENTENO AND SONIA SAMPLES

Last Name	Attendee First Name	Attendee Company	Attendee Disciplines	Attendee Fee Type
Acerra	Guy	Ameriprise	CLU, CFP	Paid Member for September 2016 - May 2017
Adame	Norma	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
Ahlenius	Erik	Jefferson Bank		Paid Member for September 2016 - May 2017
Alexander	Katy	Vogt Auction		Paid Member for September 2016 - May 2017
Alvarez	David	Intercontinental Wealth Advisors		Paid Member for September 2016 - May 2017
Augsburger	Bob	Carl A. Werner, P.C.		Paid Member for September 2016 - May 2017
Aymes	Gary	Broadway Bank	Trust Officer	Paid Member for September 2016 - May 2017
Baker	James	USAA Trust Services		Paid Member for September 2016 - May 2017
Balmaceda	Susan	Broadway Bank		Paid Member for September 2016 - May 2017
Bayern	Art	Langley & Banack	Attorney	Paid Member for September 2016 - May 2017
Bayern	William	Langley & Banack, Inc.	Attorney	Paid Member for September 2016 - May 2017
Belanger	Roberta	Frost Bank	CTFA	Paid Member for September 2016 - May 2017
Blackmore	Sara	ATKG, LLP		Paid Member for September 2016 - May 2017
Bonilla	Monica	Broadway Bank	Attorney	Paid Member for September 2016 - May 2017
broemsen	debbie	usaa		Paid Member for September 2016 - May 2017
Brown	Spencer	Accountable Aging Care Management	LNFA, CMC	Paid Member for September 2016 - May 2017
Browning	Mark	Texas A&M Foundation	CTFA	Paid Member for September 2016 - May 2017

03/21/17 LUNCHEON

FINANCIAL EXPLOITATION - IF IT'S NOT YOUR MONEY, IT'S A CRIME

LISA SENTENO AND SONIA SAMPLES

Brysacz	Matthew	Brysacz Law Firm, PLLC	Attorney	Paid Member for September 2016 - May 2017
Cannon	Steven	Gardner Law Firm		Paid Member for September 2016 - May 2017
Carlton	Kristin	Exencial Wealth Advisors		Paid Member for September 2016 - May 2017
chapa	sylvia	usaa		Paid Member for September 2016 - May 2017
Clarke	Kristi	Carl A. Werner, P.C.	Attorney	Paid Member for September 2016 - May 2017
Coggins	Charles	Charles E. Coggins, CPA	Accountant, CPA	Membership Fee - New Members/Renewals (09/16-05/17)
Cornwell	Kim	South Texas Money Management	CFP	Paid Member for September 2016 - May 2017
Daubert	Jon	Frost Bank	Attorney, Trust Officer, CWS	Paid Member for September 2016 - May 2017
Davis	Sam	Catholic Charities		Paid Member for September 2016 - May 2017
Doty	Nathan	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
Douglas	Cassie	ATKG		Guest Luncheon Fee
Edenfield	Elizabeth	Accountable Aging Care Management		Guest Luncheon Fee
Edwards	Jennifer	theKFORDgroup	CPA, CVA, CFF	Paid Member for September 2016 - May 2017
Espinosa	Roberto	Northwestern Mutual	Financial Advisor, CFP, AEP, CAP	Paid Member for September 2016 - May 2017
ethridge	leanne	Frost	Trust Officer	Paid Member for September 2016 - May 2017
Finck	Kathleen	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
Flores	Matt	Kreager Mitchell, PLLC	Attorney	Paid Member for September 2016 - May 2017
Ford	Kimberly	Heinrichs & De Gennaro PC	Attorney	Paid Member for September 2016 - May 2017

03/21/17 LUNCHEON

FINANCIAL EXPLOITATION - IF IT'S NOT YOUR MONEY, IT'S A CRIME

LISA SENTENO AND SONIA SAMPLES

Ford	Jill	McReynolds & Tye, P.C.		Paid Member for September 2016 - May 2017
Ford	Kimberly	TheKFORDGroup	Accountant, CPA, MAFF	Paid Member for September 2016 - May 2017
Fox	William	Ameriprise	CLU, CFP	Paid Member for September 2016 - May 2017
Frost	Pat	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
Gasperek	Dana	RSM US LLP	Accountant, CPA	Paid Member for September 2016 - May 2017
Gelo	Gabrielle	ACSIA Partners		Guest Luncheon Fee
Giltner	Maggie	PRDG	Attorney	Paid Member for September 2016 - May 2017
Gorelik	Dana	Wells Fargo	Attorney	Paid Member for September 2016 - May 2017
Gray	Ashley	Schoenbaum, Curphy & Scanlan, P.C.		Paid Member for September 2016 - May 2017
Groves	Curtis	Frost	Attorney, Trust Officer	Paid Member for September 2016 - May 2017
Gurwitz, CFP®	Ben	Financial Life Advisors		Paid Member for September 2016 - May 2017
Hairston	David	Hairston, Johnson & Associates PLLC	MBA	Paid Member for September 2016 - May 2017
Hannah	John	John R. Hannah & Co., LLP	Accountant, CPA	Paid Member for September 2016 - May 2017
Hardaway	Julie	Broadway Bank		Paid Member for September 2016 - May 2017
Harris	Stephanie	S Harris Financial Group, LLC		Paid Member for September 2016 - May 2017
Hasting	Howard		Attorney	Paid Member for September 2016 - May 2017
HENDRICKS	DANIA	USAA		Paid Member for September 2016 - May 2017
Hetrick	Elizabeth	BroadwayBank	Attorney, Trust Officer, CTFA	Paid Member for September 2016 - May 2017

03/21/17 LUNCHEON

FINANCIAL EXPLOITATION - IF IT'S NOT YOUR MONEY, IT'S A CRIME
LISA SENTENO AND SONIA SAMPLES

Hosack	Kristin	USAA		Paid Member for September 2016 - May 2017
hughes	shawn	Broadway Bank		Paid Member for September 2016 - May 2017
Kardys	Richard	Frost Bank	Attorney, Trust Officer, CTFA, CWS	Paid Member for September 2016 - May 2017
King	Matt	King Estate Law, PLLC	Attorney	Paid Member for September 2016 - May 2017
King	Janet	King & Sommer, PLLC	Attorney	Paid Member for September 2016 - May 2017
Knowlton	Cody	Baptist Health Foundation of San Antonio		Paid Member for September 2016 - May 2017
Lacy	Karen	USAA	Senior Trust Officer	Paid Member for September 2016 - May 2017
Lamon	David	Reagan Burrus PLLC	Attorney	Paid Member for September 2016 - May 2017
Leach	Jason	Reagan Burrus PLLC	Attorney	Paid Member for September 2016 - May 2017
LoBasso	Carrie	ATKG LLP	CPA	Paid Member for September 2016 - May 2017
Longoria	Mary Ann	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
Lovell	Matthew	McReynolds & Tye, P.C.	Attorney	Paid Member for September 2016 - May 2017
Madsen	Wayne	Broadway Bank		Paid Member for September 2016 - May 2017
Mansker	Clay		Attorney	Paid Member for September 2016 - May 2017
McNeil	Carol	USAA		Paid Member for September 2016 - May 2017
McReynolds	Michael	McReynolds & Tye, P.C.		Guest Luncheon Fee
Mitchell	Shawn	U. S. Trust, Bank of America Private Wealth Management	Trust Officer	Paid Member for September 2016 - May 2017
Morris	David	Gately & Morris, P.C.	Attorney	Paid Member for September 2016 - May 2017

03/21/17 LUNCHEON

FINANCIAL EXPLOITATION - IF IT'S NOT YOUR MONEY, IT'S A CRIME

LISA SENTENO AND SONIA SAMPLES

Morrison-Stokely	Catherine	Wells Fargo Advisors, LLC	CFP	Paid Member for September 2016 - May 2017
namestnik	linda	frost bank	Trust Officer	Membership Fee - New Members/Renewals (09/16-05/17)
Netting	Conrad	Jefferson Bank Trust Department	Attorney	Paid Member for September 2016 - May 2017
Netting	Conrad	Jefferson Bank Trust Department	Attorney	Paid Member for September 2016 - May 2017
Newill	Jessica	Gardner Law Firm		Paid Member for September 2016 - May 2017
O'CONNELL	LYN	USAA		Paid Member for September 2016 - May 2017
Oliver	Jim	Calvetti Ferguson	CFP, CPA/PFS	Paid Member for September 2016 - May 2017
Oliver	Carl	Norman & Oliver, P.C.	Attorney	Paid Member for September 2016 - May 2017
Palmer	Susan	Frost Bank	Attorney, Trust Officer	Paid Member for September 2016 - May 2017
Parenti	Peter	WealthCounsel	Attorney	Paid Member for September 2016 - May 2017
Peace	Tyler	Elder Bray & Bankler PC	Attorney	Paid Member for September 2016 - May 2017
Place	Lori		CPA	Paid Member for September 2016 - May 2017
Poteet	John	Lange, Poteet & Co., LLP	Accountant, CPA	Paid Member for September 2016 - May 2017
Rademacher	Kevin	Broadway Bank		Paid Member for September 2016 - May 2017
Ramos	Melanie	USAA		Paid Member for September 2016 - May 2017
Richards	Lynn	Fusion Advisors, Inc.	CLU, AEP, ChFC, MSFS	Paid Member for September 2016 - May 2017
Robb	John	Frost	Trust Officer	Paid Member for September 2016 - May 2017

03/21/17 LUNCHEON

FINANCIAL EXPLOITATION - IF IT'S NOT YOUR MONEY, IT'S A CRIME

LISA SENTENO AND SONIA SAMPLES

Rodriguez	Lorena	Frost Bank		Paid Member for September 2016 - May 2017
Rogers	John	Frost	Trust Officer, CTFA, CWS	Paid Member for September 2016 - May 2017
Roos	Marty	Strasburger & Price, LLP	Attorney	Paid Member for September 2016 - May 2017
Roth-Roffy	Paul	HFM Services, Inc.	CPA, CFP	Paid Member for September 2016 - May 2017
Rubsamen	Rollins	Graystone Consulting		Paid Member for September 2016 - May 2017
Seitz	Casey	Broadway Bank		Paid Member for September 2016 - May 2017
Shay	Kevin		CPA	Paid Member for September 2016 - May 2017
Shirley	Sharon	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
Smith	Carolyn	Texas Financial Partners	Accountant, CPA, CAP	Membership Fee - New Members/Renewals (09/16-05/17)
Soat	Richard	BDO	CPA, ABV, CFF	Paid Member for September 2016 - May 2017
Stahl	Kimberly	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
standley	mason	reagan burrus,pllc	Attorney	Paid Member for September 2016 - May 2017
Stone	Doug	Ameriprise Financial	CFP	Paid Member for September 2016 - May 2017
Thiltgen	Sherry	South Texas Money Management		Paid Member for September 2016 - May 2017
Thompson	Jeffrey	Bernstein	Financial Advisor	Paid Member for September 2016 - May 2017
Tottenham	Candace	Jefferson Bank Trust		Paid Member for September 2016 - May 2017
Tye	Richard	McReynolds & Tye, P.C.	Attorney	Paid Member for September 2016 - May 2017

03/21/17 LUNCHEON

FINANCIAL EXPLOITATION - IF IT'S NOT YOUR MONEY, IT'S A CRIME

LISA SENTENO AND SONIA SAMPLES

Villarreal	Amanda	ATKG, LLP		Guest Luncheon Fee
Vines	Sarah	Frost Bank	Trust Officer	Paid Member for September 2016 - May 2017
Voeller	Jim	The Voeller Law Firm	Attorney, AEP	Paid Member for September 2016 - May 2017
Vogt	Rob	Vogt Auction		Paid Member for September 2016 - May 2017
Walker	Phillip	IKOR		Paid Member for September 2016 - May 2017
Warren	Mike			Paid Member for September 2016 - May 2017
Wehm,eyer	Robert	Jefferson Bank	Trust Officer	Guest Luncheon Fee
wiesner	susan	jeffersonbank	AEP, CTFA	Paid Member for September 2016 - May 2017
Wolverton	Peter	Gunn Automotive Group	Attorney	Paid Member for September 2016 - May 2017
Woo	James	Davidson Troilo Ream & Garza, PC	Attorney	Paid Member for September 2016 - May 2017
Wyckoff	Polly	RSM	Accountant, CPA	Paid Member for September 2016 - May 2017
Yelderman	Karl	Lange, Poteet & Co., LLP	Accountant, CPA	Paid Member for September 2016 - May 2017