

2022 Southeast Regional Meeting  
Sponsor Representative Contact listing  
The Jefferson Hotel – Richmond, VA  
**September 8-11**

**Alliance Bernstein**

Amy Botkin	Atlanta, GA	amy.botkin@bernstein.com
Joshua Rosenberg	Atlanta, GA	joshua.rosenberg@bernstein.com
Richard Robbins	Atlanta, GA	robbinsrl@bernstein.com

**Bronze**

404-279-4900  
404-279-4926  
404-279-4900

**Bessemer Trust**

Oliver Iselin	Atlanta, GA	iselin@bessemer.com
Thomas Bell	Atlanta, GA	bellt@bessemer.com

**Bronze**

404-965-9300  
404-965-9308

**Brown Brothers Harriman**

Kerri Mast	Charlotte, NC	kerri.mast@bbh.com
------------	---------------	--------------------

**Platinum**

704-334-5573

**Censeo Advisors**

Troy Ingham	Atlanta, GA	tingham@censeoadvisors.com
-------------	-------------	----------------------------

**Bronze**

404-480-9040

**Christie's**

Steve Zick	Chicago, IL	szick@christies.com
Tash Perrin	New York, NY	tperrin@christies.com

**Bronze**

312-787-2765  
212-636-2058

**Colony Family Offices**

Tom Byrd	Charlotte, NC	tbyrd@colonycfo.com
Shannon Elliott	Charlotte, NC	selliotte@colonycfo.com
Eric Ridenour		

**Bronze**

704-285-7267  
704-285-7271

**Cumberland Trust**

Jennie Menzie	Nashville, TN	jmenzie@cumberlandtrust.com
Heather Savage	Knoxville, TN	hsavage@cumberlandtrust.com
Shelly Donaldson	Atlanta, GA	sdonaldson@cumberlandtrust.com

**Bronze**

615-783-2549  
865-251-5432  
615-795-2249

**Diversified Trust**

Michael Gragnani	Atlanta, GA	mgragnani@diversifiedtrust.com
Eric Main	Charleston, SC	emain@diversifiedtrust.com
Wallace "Buster" Johnson	Greensboro, NC	wjohnson@diversifiedtrust.com

**Silver**

770-226-5333  
854-500-8138  
336-458-1050

**Empire Valuation Consultants**

Hugh Woodside	Rochester, NY	hwoodside@empireval.com
Scott Rogers	Charlotte, NC	srogers@empireval.com

**Silver**

585-794-5720  
704-999-5264

**National Christian Foundation**

Brandon Davis	Charlotte, NC	bdavis@ncfgiving.com
Richard Newton	Raleigh, NC	rnewton@ncfgiving.com
Glenda Waldschmidt	Alpharetta, GA	gwaldschmidt@ncfgiving.com

**Silver**

704-716-2900  
919-815-5423  
800-681-6223

**JP Morgan**

Ware Palmer	Washington, DC	ware.palmer@jpmorgan.com
Michael Pagliucio	Washington, DC	michael.x.pagliucio@jpmorgan.com
Stephen Parker	Atlanta, GA	stephen.e.parker@jpmorgan.com
Matthew Moore	Charlotte, NC	matthew.c.moore@jpmorgan.com
Elizabeth J. Hopkins	Washington, DC	elizabeth.j.hopkins@jpmorgan.com

**Gold**

202-533-2473  
202-533-2100  
404-926-2504  
704-339-6849  
202-533-2100

**Nease, Lagana, Eden & Culley Inc.**

Brent Eden	Atlanta, GA	beden@nlec.com
Peter Fleming	Atlanta, GA	pfleming@nlec.com
Walt Helms	Atlanta, GA	whelms@nlec.com

**Gold**

770-956-1800  
770-763-0687  
770-763-0673

**Sterling Foundation Management LLC**

Dave Murray	Vancouver, BC	david.murray@sterling-foundations.com
-------------	---------------	---------------------------------------

**Bronze**

703-997-4717

**The Morehead Group**

Ken Samuelson	Charlotte, NC	ksamuelson@moreheadgroup.com
---------------	---------------	------------------------------

**Gold**

704-676-6162

**Willamette Management Associates**

Weston Kirk	Atlanta, GA	wckirk@willamette.com
Sam Nicholls	Atlanta, GA	ssnicholls@willamette.com

**Bronze**

404-475-2308  
404-475-2311

As part of the sponsorship program, each sponsor is provided mailing addresses for all pre-registered Fellows and is permitted to send one communication prior to, and another after the meeting.

This is a complete list of sponsor representatives attending the 2022 Southeast Regional Meeting. Please take a moment to introduce yourself to our sponsors and thank them for their continued support.