

## WPB ROUNDTABLES

Years	Speaker	Speaker Professional Title	Presentation Topic	
2006-2007	Colleen Alsobrook	Breast Health Navigator	“Live to Give: The ABC’s of Breast Health”	
	Tommy Smith, PhD	Associate Professor, HDFS	“Live to Give: Depression and It’s Bright Side”	
	Tanisha Carino, PhD	Director for the Center of Evidence Based Medicine	“Live to Give: Understanding the New Medicare Program”	
	Jackie DiPofi, PhD	Director	“Minding Your Own Business”	
2006-2007	Lynne Hawkins Boucher, CPA	CPA	“Year End Close Out: Preparing for 2006 Taxes”	
	Susan Moore, JD Dale Miskell	President Supervisory Special Agent	“Information is Power: Setting Your Financial Goals” “Information is Power: Don’t Let your Identity Be Stolen”	
2007-2008	Kay Ivey	State Treasurer	“Today’s Decisions for Tomorrow’s Money”	
	Frank and Carol Morsani	Philanthropists	“Inspired Philanthropy: A Family’s Commitment to Leave a Legacy”	
	Elizabeth Hutchins, LLM, JD	Attorney, Shareholder	“Today’s Decisions for Tomorrow’s Money: Have a Wish Make a Will”	
	Katye Delashaw	Financial Advisor	“Today’s Decisions for Tomorrow’s Money: Financial Facts Every Woman Should Know”	
	Beverlye Brady, JD	Attorney/ Founder	“Successfully Navigating Through a Separation or Divorce”	
<b>Bernini Tour of Italy</b>				
2008-2009	Susan Moore, JD Keivan Deravi, PhD Dave Dennis	President Professor, Economics President/ Chairman	“Extra” Roundtable - Economic Crisis - Investing “Extra” Roundtable - Economic Crisis - Economics “Extra” Roundtable - Economic Crisis - Fed Policy	
	Sandi Aplin	Real Estate Broker	“Navigating the Challenges in Today’s Economy: Current Trends in the Real Estate and Mortgage Markets”	
	Vicki Williams	President	“Navigating the Challenges in Today’s Economy: Current Trends in the Real Estate and Mortgage Markets”	
	Susan Moore, JD	President	“Navigating the Challenges in Today’s Economy: Taxes and the Economy with the New President”	
	Jeff Holloway, MBA	President	“Debt Free and Financially Fit”	
	Linda Descano, CFA	President and COO	“Financial Stewardship: Principles for Making Your Wealth Work for You and Your Legacy”	
	2009-2010	Irene Collins Leah Dubberly, CFP, CDFA Cheri Rudgers, LSCW Debby Spain, JD	Commissioner Dubberly Dean Group Social Worker Attorney	“Caregiving 101” “Caregiving 101” “Caregiving 101” “Caregiving 101”
Leah Dubberly, CFP, CDFA		Dubberly Dean Group	“The Eight Biggest Mistakes Investors Make”	
Brenda Dozier, PhD Vice Beverlye Brady, JD		President, Consumer Marketing and Solutions Attorney	“Financial and Legal Aspects of Divorce” “Financial and Legal Aspects of Divorce”	
Elizabeth Hutchins, LLM, JD		Attorney	“The ‘New Normal’ in Estate Planning”	
Susan Moore, JD Brenda Dozier, PhD Leah Dubberly, CFP, CDFA		President Financial Advisor Financial Advisor	“Investing in the New Normal: Identifying Your Goals” “Investing in the New Normal: Identifying Your Goals” “Investing in the New Normal: Identifying Your Goals”	
2010 -2011		Gordon Martin, JD	Senior Vice President/Chief Legal Counsel	“Philanthropy in Alabama”
		Leah Dubberly, CFP, CDFA Sandy Coaker, CPA CPA	Dubberly Dean Group “Big Tips and Big Traps for the Roth IRA”	“Big Tips and Big Traps for the Roth IRA”
	Brenda Hellums, CSA	Director of Wilson Price Family Office	“Who Will Mind Mom?”	
	Robert Williams, MBA	Division President	“Gone Fishing to Get My Foot In the Door”	
	Rosemary Elebash	Alabama State Director	“Are You a Participant in Our Democracy?”	
	Susan Moore, JD	President	“Reflections of 2010 and Your Financial Foundations for 2011”	
	Janie Gilliland, JD Jeff Holloway, MBA	Attorney President	“Understanding Debt and Credit” “Understanding Debt and Credit”	
	Susan Moore, JD	President	“Investing and Financial Planning in Today’s Environment”	
2011-2012	Brenda Dozier, PhD Leah Dubberly, CFP, CDFA	Vice President and Investment Representative Dubberly Dean Group	“Reflections of 2010 and Your Financial Foundations for 2011” “Reflections of 2010 and Your Financial Foundations for 2011”	
	Al Head Laurie Weil	Executive Director Philanthropist	“Art of Philanthropy” “Art of Philanthropy”	
	Benny LaRussa Elizabeth Hutchins, LLM, JD	CEO/ Chairman Shareholder	“Philanthropy in Alabama: Advancing Your Vision” “Philanthropy in Alabama: Advancing Your Vision”	
2012-2013	Kim Hudson	“The Butterfly Effect”	“The Butterfly Effect”	
	Leigh Kaylor	Attorney at Law	“Digital Asset Planning- Financial and Estate Planning in a Virtual World”	
2013-2014	Leah Dubberly	Financial Advisor	“Seven Mistakes Investors Make in a Volatile Market”	
	Brenda Dozier	Financial Consultant	“Getting Financially Fit”	
2014-2015	Latitia Long	Director of National Geo-Spatial Intelligence Agency	“Leadership: Transforming the US Intelligence Agency”	
2015-2016	Pamela Revels	Corporal, Lee County Sheriff’s Department	“Personal Safety”	
	Brenda Dozier	Financial Consultant	“Longevity and Retirement Risk”	
	Leah Dubberly	Financial Advisor		
2016-2017	Alesia Davenport	Senior Director of Gift Planning	“Here Today, Gone Tomorrow”	
	Irby Powell	Vice President	“Long-Term Care...the biggest threat to your plans for retirement”	
	Kathy Powell	Agent/Owner	“Does Your Insurance Have you Covered?”	
	Greg Doepke	Philanthropic Advisor	“Cleaning Out Your Financial Attic”	
	Nancy Bernard	Director, Career Center	“Dining Etiquette”	
2017-2018	Mike Lutzenkirchen	Executive Director, Lutzie 43 Foundation	“What Legacy are You Leaving?”	
	WPB Night at the Movies		“Jane” Premier of National Geographic Movie	
	Sid James	Executive Director	“Who’s at Your Planning Table?”	
	Alicia & Jim Storebeck	Owner, Initial Outfitters	“Making a Living that Makes a Difference”	
	Alesia Davenport	Senior Director, Gift Planning, Auburn University	“It’s Icing on the Cake: Charitable IRA Rollovers”	
2018-2019	Mallory Hagan	Former Miss America, Brand Strategist	“Stand Out to Succeed”	
	Ada Ruth Huntley	Nutrition Student	“Food for Thought”	
	Denise Grove	CPA	“There’s an App for That”	
	Josh & Beth Hornsby		“Nourishing Alabama”	
2019-2020	Jamie Toney & Shannon Works	National Social Security Advisor	“Making the Most of Social Security”	
	Leah Dubberly	Wealth Advisor	“The Eight Biggest Mistakes Investors Make in a Volatile Market”	
	Greg Doepke	Philanthropic Advisor and Educator	“The 7 Key Beliefs of Philanthropy”	
	Tracie West	State of Alabama Schools Board	“Alabama Return to School: Developing the Roadmap”	
	Pamela Haney	Canine Performance R & D Manager	“The Auburn Dog: How Canine Performance Sciences is Advancing the Mobile Sensor Technology”	
	Laura Eason Mandy Trawick	Chaplain, EAMC Foundation Dir., EAMC	“The Heartbeat of the Community” “The Heartbeat of the Community”	
	Michael Greene	Associate Professor	“The Mediterranean Diet: A Sustainable Approach for a Healthy Lifestyle”	
2020-2021	Brooke & Laura Kirkpatrick	Buyer	“The Family of Fashion”	
	Melea Hames	Social Media Manager	“Let’s Get Social: Social Media How To”	
	Dr. Michael Aikens	Heart Physician	“Heart Health”	
	Carie Tindill	Entrepreneur and Baker	“The Designing Women: Carie Tindill designs it all”	
	Martin O’Neill	Department Head	“Rane Culinary Science Center”	
	Jessica Ventiere	District Attorney Pro Tem	“Lee County’s First Lady of Justice”	
	Stacy Miller	Wealth Advisor	“Budgeting Like a Boss”	
	Tracie West	Board Member	“Alabama Return to School: Following the Roadmap Part 2”	
	Stacy Miller	Wealth Advisor	“Investing Like a Boss”	
	Candice Gulley Alicia Powers	Director Managing Director	“Nonprofit Spotlight” “Nonprofit Spotlight”	
	Carol Sue Nelson Sarah Skipper	Commissioner Executive Director	“Women of Action: Improving and Advancing the Lives of Alabama Women”	
	Cindi Malinick	Executive Director	“Celebrating the Cultural Contributions of Women”	
	Morgan Beadles	Director	“Cultivating Nature in the Heart of Auburn”	
	Brianne Smith	Wealth Advisory and CPA	“Own Your Influence: StrongHER Money”	
	Greg Sellers & Barry Prim	Warren Averett	“Estate Planning Workshop”	
2021-2022	Laurel Callaway Buckalew	Wealth Manager	Mindful Money Matters	
	Kelley Wells	Director	Helping Children Develop	
	Portia Johnson	Assistant Professor and Extension Specialist	Everything You Need to Know about FAFSA	
	Portia Johnson	Assistant Professor and Extension Specialist	Money Smart Kids	
	Lily Zandieh	Graduate Assistant/PhD Student	“Intermittent Fasting: Fact, Fiction, or Fad?”	