

# WPB SPRING SYMPOSIUM AND LUNCHEONS

Keynote Speakers in Bold

Year	Speaker	Speaker Professional Title	Presentation Topic
2003	<b>Jean Chatzky</b>	Editor at Large/Financial Expert	“Money and Happiness”
	Nancy Davis, JD	Attorney at Law	“Where There’s a Will There’s a Way”
	Dale Henderson, CFS Heather Heath Goss	Financial Advisor Financial Advisor	“Pushing Them Out of the Nest- Financial Planning for College” “Pushing Them Out of the Nest- Financial Planning for College”
2004	<b>Patricia “Sister” Barnes</b>	Founder	“From Rolls to Riches”
	Lilia Clemente	Chairman and Chief Executive Officer	“Women Investing in a Global Economy”
	Jane Bryant Quinn	Columnist and Financial Expert	“Protecting Yourself Financially in Difficult Times”
	Kay Ballard, JD	Philanthropic Advisor and Humorist	“True Confessions: Kay Ballard Tells the Shocking Truth”
	Michael Fowler, JD	1st Vice President and Wealth Planning Director	“Estate Planning in an Uncertain World”
	Johnna Flowers, LMFT	LMFT	“Fear Factor: Talking to Aging Parents about Money and Finances”
2005	<b>Candace Bahr CEA, CDFIA</b> <b>Ginita Wall, CPA</b>	Authors and Co-founders Authors and Co-founders	“This is Your Life: Engage, Enhance and Energize This is Your Life: Taking the Next Steps”
	Kay Wilburn, JD, LLM	Attorney at Law, Associate	“Pursing Philanthropic Endeavors Through Foundations”
	Diane Mooney	Founder	“Celebrating Style, Empowering Lives”
2006	Joan Kenley, PhD	Author/Psychologist	“Live to Give: Rx for Your Finances and Health/ Rx for Your Circle of Value and Philanthropic Endeavors”
	Susan Moore, JD	President	“To Care or Not to Care for the Long Term”
	Tanisha Carino, PhD	Director	“What You Don’t Know is Costing You”
	Jackie DiPofi, PhD	Director	“Rx for Life-Long Budgeting”
	<b>Nancy Lopez</b>	Professional Golfer	“Back in Full Swing”
2007	Janet Bodnar	Editor	“Money Smart Women”
	Dan Silverstein	Managing Director	“Risking Money on Mouse Traps”
	Maru Pichardo	Managing Director	“Mexican Stock Market: Growth & Perspectives”
	Vicki Williams	President	“What is Your Credit Worth?”
	Dale Miskell	Supervisory Special Agent	“Cyber Crime: Battling the Phantom Foe”
	<b>Dawn Robertson</b>	President, Old Navy	
2008	John Manley, JD	Managing Director and Equity Strategist	“Capital Markets in 2008: Navigating Treacherous Waters”
	Lauren Bush Ellen Gustafson	Founder Founder	“Inspiring the Next Generation of Philanthropists” “Inspiring the Next Generation of Philanthropists”
	Jera Stribling	Executive Director	“The Gift of Giving”
	Dave Dennis	President/ Chairman	“The Federal Reserve Board and Its Impact on Your Economy”
	Katye Delashaw	Financial Advisor	“Living Solo: Important Financial Decisions and Issues Facing Women in Transition”
	Maru Pichardo	Managing Director	“Mexico: Building a Base for Better Growth”
	<b>David Bronner</b>	CEO, Retirement Systems of Alabama	“Leadership and Our World Problems”
2009	<b>Gene Dodaro</b>	Acting Comptroller General and Head of US Government Accountability Office	“Government Accountability Office: Helping the Nation Deal with Immediate and Long-Term Fiscal Challenges”
	David Altig, PhD	Senior Vice President and Director of Research	“The Economic Outlook in the United States and Abroad”
	Burt White	Managing Director of Research	“Road to Recovery”
	Leura Canary, JD	US Attorney, Middle District of Alabama	“Finding Your Philanthropic Passion: How I Became Involved in the Fight to End the Sexual Exploitation of Children”
	Brenda Dozier, PhD Hank Walker, CFP	Financial Advisor President and CEO	“Women and Money: Roles, Expectations and Attitudes” “Women and Money: Roles, Expectations and Attitudes”
	Susan Moore, JD Dave Dennis	President President/ Chairman	“The Economy Revisited- Six Months Later: Three Perspectives of the Current Financial Crisis”
2010	<b>Knight Kiplinger</b>	Editor in Chief	“Women, Philanthropy and America’s Economic Future”
	Joanna Krotz	Author, Contributing Editor for Philanthropy	“The Power of the Purse is Changing the World: How Women Are Creating Impact”
	Stephanie Brown, JD	General Counsel	“Financial Services and Health Care Reform: What Will These Major Legislative Reforms Mean to You and to Your Finances?”
	Joe Zidle	Head of Global Wealth Management Investment Strategy/ Deputy Director	“Global Market and Economic Outlook”
	Katie Libbe	Vice President, Consumer Marketing and Solutions	“The Allianz Women, Money & Power Study”
	Irene Collins	Commissioner	“Your Philanthropic Footprint: Where Did the Time Go?”
	<b>Phyllis Hoffman</b>	President and CEO	“Steps Worth Taking”
2011	Elisabeth Marchant	Founder and CEO	“Empowering Women”
	Mary Ann Bartels	Head of Technical and Market Analysis	“Uncertain Times: What Does it Mean for Global Growth and Equity Markets”
	Fritz Meyer	Economist and Market Analyst	“Point of View”
	<b>Jenna Bush Hager</b>	Author/ Contributing Correspondent	“Making a Difference: How the Power of Compassion Changes Lives”
2012	Richard Golod, CIS, CIMA	Director/ Global Investment Strategies	“New World, New Opportunities”
	Cecilia Remy	Vice President	“Is Your IRA Protected for Future Beneficiaries? The Benefits of the Trusted IRA”
	Allison Black Cornelius	President and Principal Consultant	“The Blackfish: A New School of Thought for Creating High Impact Nonprofit Leaders”
	Sandy and Don Logan Carol and Frank Morsani	Philanthropists Philanthropists	“Two Families’ Quest to Make a Positive Impact” “Two Families’ Quest to Make a Positive Impact”
	<b>Andy Andrews</b>	NY Times Bestselling Author	
2013	Bucky Hellwig	Senior Vice President and Regional Portfolio Manager	
	Bill Sutton	Head of Philanthropic Services	
	Carla Harris	Managing Director and Senior Client Advisor	
	<b>Charles Best</b>	Founder	“Donors Choose”
2014	Lesley McClure	Regional Executive and Senior Officer	“2014 Economic Outlook and Overview of the Federal Reserve Bank”
	Tanisha Carino John Linnehan	Executive Vice President Manager	“The Future of Healthcare: The Impact of Obamacare” “The Future of Healthcare: The Impact of Obamacare”
	Janet Bodnar	Author and Editor	“Sustaining Legacies: Gender, Wealth and Giving”
2015	<b>Anna Buckner, Esq.</b>	Attorney	“Estate Planning: Developing a Winning Estate Planning Team”
	The Hon. Keith Watkins	Chief Judge	“Civic and Social Responsibility”
	<b>Trudy Cathy White</b>	Girls Director, Winshape Camp	This is Philanthropy
2016	Will Jimeno	Port Authority of New York and New Jersey Detective (Ret.) and 9/11 Survivor	“Faith, Hope, and Love”
	Marianne Hudson	Director of Education and Raptor Training	“Spirit”
	<b>Laura Bush</b>	Former First Lady	“Our History Our People Our Hearts”
2017	Paula Polito	Client Strategy Officer and Group Managing Director	“How Generations are Redefining Family Finances”
	Janet Bodnar Charles Pick Whitney Griswold	Editor Entrepreneur and Philanthropist Nonprofit Professional and Community Advocate	“Multi-Generational Panel Discussion on Family, Finances, & Philanthropy”
	<b>Marlo Thomas</b>	Actress and Author	“A Family Legacy of Philanthropy”
2018	Cathy Saunders	Head of Registered Investment Advisory Business	“Empower, Elevate, & Achieve: A Financial Guidebook for Women”
	Brie Williams	Vice President, Head of Practice Management	“The Power of Women in Leadership: The Making of the Fearless Girl”
	<b>Jane Goodall, DBE</b>	Founder and UN Messenger of Peace	“Reasons for Hope”
2019	<b>Emeril Lagasse</b>	Chef, Restaurateur	
	Teri Lovelace	President, Locust Impact Investing	“Social Impact Investing: An Introduction”
	Olivia Hails		“The Science of Negotiating: A Guide for Women”
	Teri Lovelace Greg Doepke		“How Social Impact Investing Can Build Vibrant and Prosperous Communities”
2020	Canceled Due to Covid-19		
2021	Canceled Due to Covid-19		
2022	<b>Dominique Dawes</b>	Olympic Gold Medalist - Gymnastics	“The Important Role of Philanthropy in International Athletic Competitions”
	<b>Rowdy Gaines</b>	Olympic Gold Medalist- Swimming	
	Nick Sellers	CEO, The World Games 2022 Birmingham	
2023	Jacquelyne Cavanaugh	Portfolio Manager, Putnam Investments	
	<b>Jean Chatzky</b>	Founder, HerMoney.com, NBC Today Show Financial Correspondent	
	<b>Doris Kearns Goodwin</b>	Pulitzer Prize-winning author and Historian	