

**David J. Bromelkamp**  
**Speaking Engagements History By Organization**

**Abdo Eick & Meyers, LLP**

- *How to Avoid Investment Frauds and Schemes by Adopting the Global Fiduciary Standards of Excellence*, Luncheon Meeting, June 4, 2009

**Apple Seed Capital**

- *Advisor Best Practices Panel*, Minneapolis Sustainable Investing Solutions Event, September 24, 2019

**Association of Fundraising Professionals**

- *Fiduciary Investment Management: Prudent Management of Planned Gifts*, Southern Minnesota Chapter, February 14, 2006
- *Fiduciary Investment Management: The Role of the Fundraising Professional*, 2005 Mid-America Fund Raising Conference, Sioux Falls, South Dakota, May 2, 2005

**Becketwood Cooperative**

- *Socially Responsible Investing: How to Align Your Investments with Your Core Values*, April 25, 2019

**Broadridge**

- *Nonprofit RFP: Prudent Process to Select a Financial Advisor*, Broadridge Webinar Program, December 5, 2023

**Fi360**

- *Fiduciary Investment Management for Trusts: How to Use Questions to Help Trustees*, Fi360 Insights Conference, April 7, 2016
- *Fiduciary Investment Management: How to Help Trustees Adopt the Prudent Investment Practices*, Fi360 Insights Conference, March 19, 2015
- *How We Use the Fi360 Toolkit in Our Firm and How Allodium Leverages the AIF Designation as an Independent, Fee-Only RIA*, Fi360 Insights Conference, April 26, 2014
- *From Theory to Execution: Implementing the Prudent Investment Practices in Your Business*, Panel Discussion, Fi360 Annual Conference, April 26, 2007

**Financial Planning Association**

- *ESG as a Tool for Values and Purpose in Your Practice*, Virtual Panel, February 21, 2021
- *Fiduciary Investment Management: The Role of the Certified Financial Planner*, Minnesota Chapter Meeting, April 19, 2005

**Hansen Jergenson, Nergaard & Co.**

- *Fiduciary Investment Management*, CPA Firm Educational Event, August 26, 2003

**Investment Forum Group**

- *How to Avoid Investment Frauds and Schemes by Adopting the Global Fiduciary Standards of Excellence*, June 1, 2009

## Iowa Society of Certified Public Accountants

- *Fiduciary Investment Management: The Twenty-Seven Prudent Investment Practices*, CE Course, September 28, 2004

## (i)x Investments

- *Can We Build Back Better? The Role of Private Capital in the Economic Recovery*, Family Impact Discussion Panel, June 11, 2020

## Kansas Association of Community Foundations

- *Shoot Ready Aim: Are Our Investments Missing the Target?* KACF Conference, September 29, 2014

## KPMG

- *Fiduciary Investment Management*, Wealth Management Practice, May 27, 2003

## LarsonAllen

- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* LarsonAllen ERISA Auditing Department, April 30, 2004

## Lorman Education Services

- *Using Investment Policy Statements as an Investment Tool: It's an Art, Not a Science*, Lorman Education Services, Lorman CLE Course, May 24, 2022
- *Using Investment Policy Statements as an Investment Tool: It's an Art, Not a Science*, Lorman Education Services, Lorman CLE Course, February 27, 2020
- *Trust Administration, Tax and Compliance for Fiduciaries in Minnesota*, Lorman Education Services, Lorman CLE Course, May 13, 2014

## Managed Funds Association

- *Sound Practices for Hedge Fund Managers*, Panel Sponsored by Faegre & Benson, September 9, 2008

## Markets Group

- *ESG in Practice for Long-Term Investors*, Markets Group, 8th Annual Great Plains Institutional Forum, Panel Speaker, September 13, 2022
- *From Real Estate to Real Assets: Seeking the Best Opportunities*, Markets Group, 4th Annual Private Wealth Great Plains Forum, Panel Moderator, July 27, 2022
- *Practical Steps Towards ESG Integration*, Markets Group, 7th Annual Great Plains Institutional Forum, Panel Moderator, September 15, 2021
- *Practical Steps Towards ESG Integration*, Markets Group, 6th Annual Great Plains Institutional Forum, Panel Moderator, September 19, 2019
- *The Future of Wealth Management*, Markets Group, Markets Group 3rd Annual Private Wealth Great Plains Forum, Panel Speaker, September 13, 2018
- *Environmental, Social, and Corporate Governance (ESG) Integration*, Markets Group, Markets Group 5th Annual Great Plains Institutional Investor Forum, Panel Speaker, September 12, 2018
- *Impact Investing for Foundations and Endowments*, 4th Annual Great Plains Institutional Investor Forum, Panel Moderator, June 27, 2017

## Minnesota Association for Financial Professionals

- *The Science of Investing: How to Get Control Over Your Investments*, Luncheon, January 9, 2014
- *Responsible Investing and the Fiduciary Role of Institutional Investors*, Monthly Meeting, November 3, 2011

## Minnesota Continuing Legal Education

- *Improving Fiduciary Investment Practices for Charitable Entities: The Role of the Legal Advisor*, 2005 Charitable Planning Institute, September 21, 2005
- *Investment Management for Fiduciaries: How to Develop a Disciplined Investment Process for Your Nonprofit Organization*, Understanding and Advising Nonprofit Organizations, April 4, 2003

## Minnesota Council on Foundations

- *How to Implement and Measure Impact: Impact Investing for Foundation Trustees and Investment Officers*, MCF Mission Investors Group, September 22, 2016
- *2011 Market Analysis and Investment Strategies to Manage Risk*, Market Outlook Program, February 16, 2011
- *Investment Stewardship: Foundation Investment Management*, Effective Grant-Making Series, January 29, 2009
- *Fiduciary Investment Management for Foundations and Endowments*, Minnesota Council of Nonprofits and Minnesota Council on Foundations Joint Annual Conference, October 2, 2003

## Minnesota Council on Nonprofits

- *Fiduciary Investment Management for Foundations and Endowments*, MCN and MCF Joint Annual Conference, October 2, 2003
- *How to Develop a Disciplined Investment Process for Your Organization*, Fundraising Workshop, February 27, 2002 and September 13, 2002

## Minnesota Hospital Association

- *Improving Fiduciary Practices: The Role of the Trustee*, Winter Trustee Conference, January 14, 2006

## Minnesota Fiduciary Roundtable

- *Fi360 Annual Conference Recap*, June Monthly Meeting, June 29, 2010
- *Fiduciary Investment Management: Investment Decisions and the Fiduciary Investor (How to Draft an Investment Policy Statement)*, April Monthly Meeting, April 6, 2010

## Minnesota Planned Giving Council

- *Fiduciary Investment Management for Gift Planners: How to Communicate Your Investment Stewardship to Donors*, 37th Annual Minnesota Planned Giving Conference, September 26, 2013
- *Investment Stewardship: Providing Fiduciary Excellence to Your Donors*, 32nd Annual Minnesota Planned Giving Conference, November 11, 2008
- *How to Select an Investment Advisor for a Charitable Trust*, 30th Annual Minnesota Planned Giving Conference, September 14, 2006
- *Fiduciary Investment Management: The Role of the Fundraising Professional*, 29th Annual Minnesota Planned Giving Conference, November 10, 2005
- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* 28th Annual Minnesota Planned Giving Conference, September 22, 2004

## Minnesota Planned Giving Council continued

- *Proactive Partnering Between Nonprofits and Advisors—Can We All Work Together?* Panel, 27th Annual Minnesota Planned Giving Council Conference, September 17, 2003

## Minnesota Society of Certified Public Accountants

- *Investment Policy Decisions for Not-for-Profit Organizations*, 31st Annual MNCPA Not-for-Profit Conference, October 25, 2011
- *Fiduciary Investment Management: How to Avoid Investment Scams by Adopting the Fiduciary Standard of Excellence*, 55th Annual Tax Conference, November 16, 2009
- *Investment Stewardship: Best Practices in Corporate Fiduciary Investments*, Caffeinated Conversations Series, February 24, 2009
- *Investment Stewardship: Managing Your Portfolio in a Down Market*, 28th Annual MNCPA Not-for-Profit Conference, October 16, 2008
- *How to Establish an Effective Investment Committee for Your Organization*, 27th Annual MNCPA Not-for-Profit Conference, October 25, 2007
- *Fiduciary Investment Management: The Role of the Professional Tax Advisor*, 50th Annual MNCPA Tax Conference, November 18, 2004
- *Fiduciary Investment Management—Prudent Investment Practices for Public Funds*, Fiduciary Investment Management Seminar Series, November 11, 2004
- *Fiduciary Investment Management for Nonprofit Organizations*, 24th Annual MNCPA, Not-for-Profit Conference, October 19, 2004
- *Fiduciary Investment Management—Prudent Investment Practices for Foundations and Endowments*, Fiduciary Investment Management Seminar Series, September 13, 2004
- *Fiduciary Investment Management—Prudent Investment Practices for Trusts*, Fiduciary Investment Management Seminar Series, June 21, 2004
- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* 22nd Annual MNCPA Estate and Personal Financial Planning Conference, June 15, 2004
- *Fiduciary Investment Management—Prudent Investment Practices for ERISA Plans*, Fiduciary Investment Management Seminar Series, June 10, 2004
- *Basic Fiduciary Investment Management*, Fiduciary Investment Management Seminar Series, June 3, 2004
- *Fiduciary Investment Management: The Twenty-Seven Prudent Investment Practices*, CE Course, December 9, 2003
- *Fiduciary Investment Management for Nonprofit Organizations*, 23rd Annual MNCPA Not-for-Profit Conference, October 21, 2003
- *Investment Policy Statements and Spending Policy Statements: Building Board Consensus*, 22nd Annual MNCPA Not-for-Profit Conference, October 25, 2002

## Minnesota Telephone Association

- *How to Develop a Written Investment Policy Statement to Fulfill Your Fiduciary Obligations*, 94th Annual MTA Convention, March 24, 2003
- *How to Develop a Disciplined Investment Process for Your Organization*, 93rd Annual MTA Convention, March 25, 2002

## Minnesota Treasury Management Association

- *Fiduciary Investment Management: How to Improve Your Investment Decision-Making Process*, 27th Annual Minnesota Treasury Management Association Conference, April 21, 2009
- *Fiduciary Investment Management: Current Issues for Financial Managers*, 23rd Annual Minnesota Treasury Management Association Conference, May 5, 2005
- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* 22nd Annual MTMA Conference, May 6, 2004
- *How to Develop a Disciplined Investment Process for Your Organization*, 21st Annual Minnesota Treasury Management Association, Conference, May 7, 2003

## Nonprofit Financial Group of the Twin Cities

- *Fiduciary Investment Management: How to Improve Your Investment Management Decision-Making Process*, Nonprofit Financial Group Meeting, March 24, 2016
- *Fiduciary Investment Management for Nonprofit Organizations*, September Monthly Meeting, September 25, 2003

## Olson Thielen & Co., LTD

- *Fiduciary Investment Management: The Role of the Certified Public Accountant*, Luncheon Meeting, October 13, 2010
- *Fiduciary Investment Management: How to Develop an Investment Strategy for the Next Bull Market*, Meeting, August 26, 2009

## RBC Dain Rauscher

- *Fiduciary Investment Management: The Role of the Professional Investment Management Consultant*, 7th Annual RBC Dain Rauscher Investment Consulting Services Symposium, Chicago, Illinois, September 30, 2004
- "Transitioning to Fees," RBC Dain Rauscher Investment Consulting Services Workshop, September 2000

## RJF Agencies

- *Fiduciary Investment Management: Are Your Clients Prepared for a Fiduciary Audit?* All Agency Sales Meeting, August 17, 2004

## Saint John's University

- *How to Develop a Long Term Investment Strategy for the Next Bull Market*, Saint John's University Alumni, May 7, 2009
- *Three Great Estate Planning Ideas—Establishing a Charitable Remainder Trust*, 2006 Saint John's Homecoming, September 30, 2006

## Securities Industry Institute (SIA)

- *Build a Team that Lasts*, 48th Annual Securities Industry Institute Panel, March 15, 2000

## Twin Cities Alternative Investments Salon

- *Prudent Investment Practices: Are You Prepared for a Fiduciary Audit?* Sponsored by Sherpa Partners, November, 19, 2003