David J. Bromelkamp

Speaking Engagements History By Date

2023

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

2022

- *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
- *Using Investment Policy Statements as an Investment Tool: It's an Art, Not a Science*, Lorman Education Services, Lorman CLE Course, May 4, 2022

2021

- *Practical Steps Towards ESG Integration***,** Markets Group, 7th Annual Great Plains Institutional Forum, Panel Moderator, September 15, 2021
- *ESG as a Tool for Values and Purpose in Your Practice***, Virtual Panel, February 21, 2021**

2020

- *Can We Build Back Better? The Role of Private Capital in the Economic Recovery.* i(x) Investments, Family Impact Discussion Panel, June 11, 2020
- *Using Investment Policy Statements as an Investment Tool: It's an Art, Not a Science*, Lorman Education Services, Lorman CLE Course, February 27, 2020

2019

- *Advisor Best Practices Panel*, Apple Seed Capital, Minneapolis Sustainable Investing Solutions Event, September 24, 2019
- *Practical Steps Towards ESG Integration*, Markets Group, Moderator—6th Annual Great Plains Institutional Forum, September 19, 2019
- *Socially Responsible Investing: How to Align Your Investments with Your Core Values*, Becketwood Cooperative, April 25, 2019

2018

- *The Future of Wealth Management*, Markets Group, Markets Group 3rd Annual Private Wealth Great Plains Forum, September 13, 2018
- *Environmental, Social, and Corporate Governance (ESG) Integration*, Markets Group, Markets Group 5th Annual Great Plains Institutional Investor Forum, September 12, 2018

2017

- I*mpact Investing for Foundations and Endowments*, Markets Group, 4th Annual Great Plains Institutional Investor Forum, Panel Moderator, June 27, 2017

2016

- *How to Implement and Measure Impact: Impact Investing for Foundation Trustees and Investment Officers*, Minnesota Council on Foundations, Mission Investors Group, September 22, 2016
- *Fiduciary Investment Management for Trusts: How to Use Questions to Help Trustees*, Fi360 Insights Conference, April 7, 2016
- *Fiduciary Investment Management: How to Improve Your Investment Management Decision-Making Process*, Nonprofit Financial Group of the Twin Cities, Nonprofit Financial Group Meeting, March 24, 2016

2015

- *Fiduciary Investment Management: How to Help Trustees Adopt the Prudent Investment Practices*, Fi360 Insights Conference, March 19, 2015

2014

- *Shoot Ready Aim: Are Our Investments Missing the Target?* Kansas Association of Community Foundations, KACF Conference, September 29, 2014
- *Trust Administration, Tax and Compliance for Fiduciaries in Minnesota*, Lorman Education Services, Lorman CLE Course, May 13, 2014
- *Unlikely Partnerships: Investment, Results and Return?—A Minnesota Way*, University of St. Thomas Center for Non-Profit Management, St. Thomas Social Entrepreneurship Panel, May 2, 2014
- *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
- *The Science of Investing: How to Get Control Over Your Investments*, Minnesota Association for Financial Professionals (MNAFP), Luncheon, January 9, 2014

2013

- *Fiduciary Investment Management for Gift Planners: How to Communicate Your Investment Stewardship to Donors*, Minnesota Planned Giving Council, 37th Annual Minnesota Planned Giving Conference, September 26, 2013

2011

- *Responsible Investing and the Fiduciary Role of Institutional Investors*, Minnesota Association of Financial Professionals (MNAFP), Monthly Meeting, November 3, 2011
- *Investment Policy Decisions for Not-for-Profit Organizations*, Minnesota Society of Certified Public Accountants, 31st Annual MNCPA Not-for-Profit Conference, October 25, 2011
- *2011 Market Analysis and Investment Strategies to Manage Risk*, Minnesota Council on Foundations, 2011 Market Outlook Program, February 16, 2011

2010

- *Fiduciary Investment Management: The Role of the Certified Public Accountant*, Olson Thielen & Co., LTD, Luncheon Meeting, October 13, 2010
- *Fi360 Annual Conference Recap*, Minnesota Fiduciary Roundtable, June Monthly Meeting, June 29, 2010
- *Fiduciary Investment Management: Investment Decisions and the Fiduciary Investor (How to Draft an Investment Policy Statement)*, Minnesota Fiduciary Roundtable, April Monthly Meeting, April 6, 2010

2009

- *Fiduciary Investment Management: How to Avoid Investment Scams by Adopting the Fiduciary Standard of Excellence*, Minnesota Society of Certified Public Accountants, 55th Annual Tax Conference, November 16, 2009

2009 Continued

- *Fiduciary Investment Management: How to Develop an Investment Strategy for the Next Bull Market*, Olson Thielen & Co., LTD, Meeting, August 26, 2009
- *How to Avoid Investment Frauds and Schemes by Adopting the Global Fiduciary Standards of Excellence*, Abdo Eick & Meyers, LLP, Luncheon Meeting, June 4, 2009
- *How to Avoid Investment Frauds and Schemes by Adopting the Global Fiduciary Standards of Excellence*, Investment Forum Group, Weekly Meeting, June 1, 2009
- *How to Develop a Long Term Investment Strategy for the Next Bull Market*, Saint John's University, Saint John's University Alumni, May 7, 2009
- *Fiduciary Investment Management: How to Improve Your Investment Decision-Making Process*, Minnesota Treasury Management Association, 27th Annual Minnesota Treasury Management Association Conference, April 21, 2009
- **Investment Stewardship: Best Practices in Corporate Fiduciary Investments**, Minnesota Society of Certified Public Accountants, Caffeinated Conversations Series, February 24, 2009
- *Investment Stewardship: Foundation Investment Management*, Minnesota Council on Foundations, Effective Grant-Making Series, January 29, 2009

2008

- *Investment Stewardship: Providing Fiduciary Excellence to Your Donors*, Minnesota Planned Giving Council, 32nd Annual Minnesota Planned Giving Conference, November 11, 2008
- *Investment Stewardship: Managing Your Portfolio in a Down Market*, Minnesota Society of Certified Public Accountants, 28th Annual MNCPA Not-for-Profit Conference, October 16, 2008
- *Sound Practices for Hedge Fund Managers*, Managed Funds Association, Panel Sponsored by Faegre & Benson, September 9, 2008

2007

- *How to Establish an Effective Investment Committee for Your Organization*, Minnesota Society of Certified Public Accountants, 27th Annual MNCPA Not-for-Profit Conference, October 25, 2007
- *From Theory to Execution: Implementing the Prudent Investment Practices in Your Business*, Fi360 Annual Conference Panel Discussion, April 26, 2007

2006

- *Going Independent*, Schwab Impact Conference, Panel Discussion, November 6, 2006
- *Three Great Estate Planning Ideas—Establishing a Charitable Remainder Trust*, Saint John's University, 2006 Saint John's Homecoming, September 30, 2006
- *How to Select an Investment Advisor for a Charitable Trust*, Minnesota Planned Giving Council, 30th Annual Minnesota Planned Giving Conference, September 14, 2006
- *Fiduciary Investment Management: Prudent Management of Planned Gifts*, Association of Fundraising Professionals, Southern Minnesota Chapter, February 14, 2006
- *Improving Fiduciary Practices: The Role of the Trustee*, Minnesota Hospital Association, Winter Trustee Conference, January 14, 2006

2005

- *Fiduciary Investment Management: The Role of the Fundraising Professional*, Minnesota Planned Giving Council, 29th Annual Minnesota Planned Giving Conference, November 10, 2005

2005 Continued

- *Improving Fiduciary Investment Practices for Charitable Entities: The Role of the Legal Advisor*, Minnesota Continuing Legal Education, 2005 Charitable Planning Institute, September 21, 2005
- *Fiduciary Investment Management: Current Issues for Financial Managers*, Minnesota Treasury Management Association, 23rd Annual Minnesota Treasury Management Association Conference, May 5, 2005
- *Fiduciary Investment Management: The Role of the Fundraising Professional*, Association of Fundraising Professionals, 2005 Mid-America Fund Raising Conference, Sioux Falls, South Dakota, May 2, 2005
- *How to Build a Million Dollar Fee-Based Investment Advisory Practice*, Thrivent Financial for Lutherans, Minnesota Regional RFO, April 29, 2005
- *Fiduciary Investment Management: The Role of the Certified Financial Planner*, Financial Planning Association, Minnesota Chapter Meeting, April 19, 2005

2004

- *Fiduciary Investment Management: The Role of the Professional Tax Advisor*, Minnesota Society of Certified Public Accountants, 50th Annual MNCPA Tax Conference, November 18, 2004
- *Fiduciary Investment Management—Prudent Investment Practices for Public Funds*, Minnesota Society of Certified Public Accountants, Fiduciary Investment Management Seminar Series, November 11, 2004
- *Fiduciary Investment Management for Nonprofit Organizations*, Minnesota Society of Certified Public Accountants, 24th Annual MNCPA Not-for-Profit Conference, October 19, 2004
- *Fiduciary Investment Management: The Role of the Professional Investment Management Consultant*, RBC Dain Rauscher, 7th Annual RBC Dain Rauscher Investment Consulting Services Symposium, Chicago, Illinois, September 30, 2004
- *Fiduciary Investment Management: The Twenty-Seven Prudent Investment Practices*, Iowa Society of Certified Public Accountants, CE Course, September 28, 2004
- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* Minnesota Planned Giving Council, 28th Annual Minnesota Planned Giving Conference, September 22, 2004
- *Fiduciary Investment Management—Prudent Investment Practices for Foundations and Endowments*, Minnesota Society of Certified Public Accountants, Fiduciary Investment Management Seminar Series, September 13, 2004
- *Fiduciary Investment Management: Are Your Clients Prepared for a Fiduciary Audit?* RJF Agencies, All Agency Sales Meeting, August 17, 2004
- *Fiduciary Investment Management – Prudent Investment Practices for Trusts*, Minnesota Society of Certified Public Accountants, Fiduciary Investment Management Seminar Series, June 21, 2004
- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* Minnesota Society of Certified Public Accountants, 22nd Annual MNCPA Estate and Personal Financial Planning Conference, June 15, 2004
- *Fiduciary Investment Management – Prudent Investment Practices for ERISA Plans*, Minnesota Society of Certified Public Accountants, Fiduciary Investment Management Seminar Series, June 10, 2004
- *Basic Fiduciary Investment Management*, Minnesota Society of Certified Public Accountants, Fiduciary Investment Management Seminar Series, June 3, 2004
- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* Minnesota Treasury Management Association, 22nd Annual MTMA Conference, May 6, 2004
- *Fiduciary Investment Management: Are You Prepared for a Fiduciary Audit?* LarsonAllen, ERISA Auditing Department, April 30, 2004

2004 continued

- *Fiduciary Investment Management: The Role of the Professional Investment Management Consultant*, Investment Management Consultants Association, 2004 Spring Professional Development Conference, Boca Raton, Florida, April 26, 2004

2003

- *Fiduciary Investment Management: The Twenty-Seven Prudent Investment Practices*, Minnesota Society of Certified Public Accountants, CE Course, December 9, 2003
- *Prudent Investment Practices: Are You Prepared for a Fiduciary Audit?* Twin Cities Alternative Investments Salon, Sponsored by Sherpa Partners, November, 19, 2003
- *Fiduciary Investment Management for Nonprofit Organizations*, Minnesota Society of Certified Public Accountants, 23rd Annual MNCPA Not-for-Profit Conference, October 21, 2003
- *Fiduciary Investment Management for Foundations and Endowments*, Minnesota Council of Nonprofits and Minnesota Council on Foundations Joint Annual Conference, October 2, 2003
- *Fiduciary Investment Management for Nonprofit Organizations*, Nonprofit Financial Group of the Twin Cities, September Monthly Meeting, September 25, 2003
- *Proactive Partnering Between Nonprofits and Advisors – Can We All Work Together?* Minnesota Planned Giving Council Panel, 27th Annual Minnesota Planned Giving Council Conference, September 17, 2003
- *Fiduciary Investment Management*, Hansen Jergenson, Nergaard & Co., CPA Firm Educational Event, August 26, 2003
- *Fiduciary Investment Management*, KPMG, Wealth Management Practice, May 27, 2003
- *How to Develop a Disciplined Investment Process for Your Organization*, Minnesota Treasury Management Association, 21st Annual Minnesota Treasury Management Association Conference, May 7, 2003
- *Investment Management for Fiduciaries: How to Develop a Disciplined Investment Process for Your Nonprofit Organization*, Minnesota Continuing Legal Education, Understanding and Advising Nonprofit Organizations, April 4, 2003
- *How to Develop a Written Investment Policy Statement to Fulfill Your Fiduciary Obligations*, Minnesota Telephone Association, 94th Annual MTA Convention, March 24, 2003

2002

- *Investment Policy Statements and Spending Policy Statements: Building Board Consensus*, Minnesota Society of Certified Public Accountants, 22nd Annual MNCPA Not-for-Profit Conference, October 25, 2002
- *How to Develop a Disciplined Investment Process for Your Organization*, Minnesota Council on Nonprofits, Fundraising Workshop, February 27, 2002 and September 13, 2002
- *How to Develop a Disciplined Investment Process for Your Organization*, Minnesota Telephone Association, 93rd Annual MTA Convention, March 25, 2002

2000

- *Transitioning to Fees*, RBC Dain Rauscher, Investment Consulting Services Workshop, September 2000
- *Build a Team that Lasts*, Securities Industry Institute (SIA), 48th Annual Securities Industry Institute Panel, March 15, 2000