



### Barbara A. Culver, CFP®, CLU, ChFC, AEP

A principal of Resonate, Inc. ([www.resonatecompanies.com](http://www.resonatecompanies.com)) and co-creator of the Purposeful Planning™ curriculum ([www.purposeful-planning.com](http://www.purposeful-planning.com)), Barbara A. Culver is nationally-known by her peers as a financial and legacy planner, speaker, consultant and author.

Unlike most professional advisors, who bring a transactional approach to planning, Barb distinguishes her company with client-centered legacy planning. This process integrates all aspects of the clients' lives – financial, emotional, social and spiritual. She then aligns “who people are” with “what they have” through state-of-the-art plan design. Since Barb is a leader in the client-centered legacy approach, she is a much sought after industry speaker and brings vast personal and professional life experiences to share.

Barb consults extensively with professional advisors and the financial services industry in the area of purposeful planning, as well as with various non-profits around the nation regarding building their endowments using client-centered legacy strategies. She developed Purposeful Planning Training as a way to help financial and legal advisors, development officers and psychologists to work with clients on a deeper, more meaningful level – to help them increase their trust in themselves and uncover their core purpose for the use of their wealth.

Barb earned a BA in Education from Bowling Green State University. She is a Certified Life Underwriter (CLU), a Chartered Financial Consultant (ChFC), a Certified Financial Planner professional (CFP and an Accredited Estate Planner (AEP).

#### MEDIA RESOURCE

Barb has co-authored the books:

- ◆ Getting to the Heart of the Matter
- ◆ For Women By Women: Financial Passages
- ◆ Giving: Philanthropy for Everyone

Barb has appeared on:

- ◆ CBS “This Morning”
- ◆ CNBC “Money Talk”
- ◆ National Public Radio

She has been quoted in:

- ◆ Money Magazine
- ◆ National Underwriter
- ◆ Wall Street Journal
- ◆ New York Times
- ◆ Financial Planning
- ◆ Town & Country

She serves as Editor-in-Chief of the Commerce Clearing House *Journal of Practical Estate Planning*, which is the only values-based estate planning professional journal in the United States.

## Memberships/Positions

- ◆ Cincinnati Zoo and Botanical Garden Development Committee
- ◆ Editor-in-Chief - CCH Journal of Practical Estate Planning
- ◆ Greater Cincinnati Estate Planning Council- Member
- ◆ Greater Cincinnati Planned Giving Council - Member
- ◆ Financial Planning Association - Member
- ◆ International Association of Advisors in Philanthropy - Member
- ◆ National Committee on Planned Giving - Member
- ◆ National Association of Estate Planners and Councils - Member

## Accomplishments/Awards

- ◆ Qualifying Member, MDRT Court of the Table – 1994-1997, 2001-2006
- ◆ Qualifying Member, MDRT Top of the Table – 1998-2000, 2007-2008
- ◆ Life Qualifying Member, MDRT – 2001-2007
- ◆ Leading Women 2000, Woman of the Year in Finance & Banking – 2000
- ◆ Five Star Wealth Manager, Best in Client Satisfaction – 2008

## Selected Speaking Experience

- ◆ AALU Annual Meeting – 2005 – #1 TOP RATED SPEAKER
- ◆ Advisors in Philanthropy – 2006, 2008
- ◆ Association Foundation Group – Washington DC – 2006
- ◆ Charitable Giving Forum – New York – 2003
- ◆ Cincinnati Estate Planning Council - 2008
- ◆ FPA – Chicago Financial Forum – 2003
- ◆ FPA – Southern Nevada Financial Symposium – 2008
- ◆ Good Samaritan Hospital Foundation – 2003-2008
- ◆ Greater Cincinnati Planned Giving Council – 2005
- ◆ LSU Health Sciences Foundation – 2007
- ◆ MDRT Annual Meeting – 2004
- ◆ NAIFA Financial Advisor Forum – 2001
- ◆ NAPFA National Conference – Chicago IL - 2006
- ◆ National Association of Estate Planners & Councils – 2004
- ◆ NCPG National Conference – 2004
- ◆ Ohio Society of CPAs – 2003, 2007, 2008
- ◆ Ohio Northern University – 2005
- ◆ Selected Professional Groups and Donors – Bermuda – 2006
- ◆ University of St. Thomas - Houston TX – 2005, 2006
- ◆ Women 4 Women – Louisville KY – 2006-2007

*Barb is a great resource for stories on family succession and legacy planning. She is also happy to share how she integrates a psychologist, an estate planning attorney and a philanthropy expert in her work with her clients.*

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