

Barbara A. Culver

CFP[®], ChFC[®], CLU, AEP[®]

Barbara A. Culver is the founder of Resonate Inc.

As the name implies, Resonate guides clients to create fulfilling life and legacy plans for today which will also positively impact the lives of others long into the future. A graduate of Bowling Green State University, Barb is committed to lifelong learning. Barb is also about people, life purpose, philanthropy and legacy planning. In fact, Barb's unique planning process is called Purposeful Planning which transcends traditional planning by integrating who you are with what you have. If you seek a financial planning experience which integrates your financial assets with your legacy while also emphasizing your values and beliefs, the Purposeful Planning process is designed for you. When not guiding clients through this powerful process or mentoring younger members of the Resonate team, Barb enjoys global travel, boating, downhill skiing and simply spending time with cherished family and friends.



Memberships

*Greater Cincinnati Estate Planning Council
Greater Cincinnati Planned Giving Council
Financial Planning Association
National Association of Estate Planners and Councils
Purposeful Planning Institute*

Accomplishments/Awards

*Advisors in Philanthropy Fithian Leadership Award – 2009
MDRT Court of the Table – 1994-1997, 2001-2006, 2014-2016
MDRT Top of the Table – 1998-2000, 2007-2016
Life Qualifying Member, MDRT – 2001-2016
Leading Women 2000, Woman of the Year in Finance & Banking – 2000*

Selected Speaking Experience

*AALU Annual Meeting
Advisors in Philanthropy
Association Foundation Group – Washington DC
Charitable Giving Forum – New York
Cincinnati Estate Planning Council
FPA – Chicago Financial Forum
FPA – Southern Nevada Financial Symposium
Good Samaritan Hospital Foundation
Greater Cincinnati Planned Giving Council
LSU Health Sciences Foundation
Louisville Planned Giving Council
MDRT Annual Meeting
NAPFA National Conference – Chicago IL
National Association of Estate Planners & Councils
Ohio Society of CPAs
Otterbein Retirement Living Communities
Partnership for Philanthropic Planning National Conference
Selected Professional Groups and Donors – Bermuda
University of St. Thomas – Houston TX
Women 4 Women – Louisville KY*

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Fee-Based Planning offered through Resonate Advisors, Inc. a State Registered Investment Advisor
Securities offered through ValMark Securities, Inc., Member FINRA, SIPC. Third Party Management offered through ValMark Advisers, Inc.,
a SEC Registered Investment Advisor. 130 Springside Dr., Suite 300, Akron, OH. 44333, 800-765-5201.
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