

# Barbara A. Culver

CFP<sup>®</sup>, ChFC<sup>®</sup>, CLU, AEP<sup>®</sup>

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, 2014-2015  
MDRT Top of the Table – 1998-2000, 2007-2015  
Life Qualifying Member, MDRT – 2001-2015  
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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