

## F.L.Putnam Investment Management Company

F.L.Putnam Investment Management Company is an independent firm that provides a comprehensive range of personalized investment management services. We are registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940. Our offices are located in Portland, Maine and Wellesley, Massachusetts. We have a nationally-diversified clientele including individuals, families, foundations, religious organizations, endowments, unions and other institutions.

**Christian McVey**, Senior Vice President, F.L.Putnam Investment Management Company  
Two City Center, Portland, ME 04101  
cmcvey@flputnam.com | 800.344.3435 x108 | [www.flputnam.com](http://www.flputnam.com)

## Foundation Source

Foundation Source is the nation's leading provider of comprehensive support services for private foundations. The company's core back-office, online and support services ease the administrative and grants management burden, freeing foundations to focus more on mission, strategy and family priorities and less on back-office administration and compliance tasks. We also offer a full complement of Advanced Services for those foundations with evolving philanthropic and technology requirements.

**Stephen Vondrak**, Sr. Managing Director, Foundation Source  
6 Eagle Head Road, Cornwall on Hudson, NY 12520  
svondrak@foundationsource.com | 845.774.9055 | [www.foundationsource.com](http://www.foundationsource.com)

## Karen Schaller, Fundraising Database Specialist

As a fundraising database consultant, Karen works with small to medium-sized nonprofits and targets inefficiencies in their database management and donor cultivation. Karen Schaller can help your organization: improve management and utilization of your donor and prospect data; cultivate and maintain relationships; focus and optimize your fundraising efforts; increase your accountability. Services include data evaluation, database conversions, and database training.

**Karen Schaller**, Fundraising Database Specialist  
1388 Avenue Road, Exeter, ME 04435 | [karenschaller@tds.net](mailto:karenschaller@tds.net) | 207.379.2032 | [www.karenschaller.com](http://www.karenschaller.com)

## William F. Stockwell & Associates, LLC & SUSTAIN

William Stockwell has served over 283 clients in 39 years of service to New England Non-Profits, helping organizations improve their development potential through highly personalized, traditional development techniques along with cutting edge technology to raise over \$43 Million through Annual Funds, Major Gifts, Capital Campaigns, Endowments, and Planned Giving. He has also helped hundreds of organizations computerize their development offices and is a Dealer for SUSTAIN Fundraising Management.

**William Stockwell**, William F. Stockwell & Associates, LLC  
264 Passaconaway Road, PO Box 84, Waterford, ME 04088  
fndrsr@fndrsr.com | 207.583.2258 | [www.fndrsr.com](http://www.fndrsr.com)

## Unger & Associates LLC

NonProfit Consulting and Fundraising Software

**David Unger**, President, Unger & Associates LLC  
PO Box 6320, Cape Elizabeth, ME 04107  
solutions@davidunger.net | 207.712.1415 | [www.davidunger.net](http://www.davidunger.net) | [www.tcmgr.com](http://www.tcmgr.com)

## Winklevoss Technologies

SimMetric takes foundation management to the next level. It allows you to model alternative spending policies and compare how they perform relative to the current policy. The approach is to forecast fund levels into the future and measure how the alternative formulas perform against objectives. It facilitates the development of a spending policy that is in harmony with the investment policy at the structural level, breaking the dependency on overrides.

**Colin Gilbert**, Sales Executive, Winklevoss Technologies, LLC  
Two Greenwich Office Park, Greenwich, CT 06831  
cgilbert@winklevoss.com | 203.861.5503 | [www.winklevoss.com](http://www.winklevoss.com)

