



Placer SPCA's

**Planned Giving
Professionals Directory**



Circle of Hope

If your legacy plan includes the Placer SPCA, you can join the Circle of Hope Legacy Society. Members of our Circle of Hope Legacy Society have included Planned Gifts in their will, trust, or estate, and have notified us of their intentions.

Member benefits include: gift of appreciation, recognition in the Placer SPCA newsletter and website, special invitation to annual CEO Forum, invitations to donor gatherings, and listing in major event programs

Current members listed with permission:

Ann Palmer
Anne Hauber
Barbara Benedict
Barbara Pope
Barbara Smookler
Bill & Nancie Radakovitz
Carol Cope
Carol Zerbo
Carole Haskell
Carolyn Eakin
Carolyn Hemig
Cathi Meyers & Laura Brown
Charlene Michelson
Charlie & Christie Harrison
Colin Grahl & Karen Hauber-Grahl
Colleen & John Valentine
Colleen Watters
Constance Detweiler
Creighton & Nancy Fong
Dale & Faye Bright
Dan & Evelyn Jensen
David Crawford
David E. & Lora L. Masche
David Tavernetti
Debbie Wrigley
Deborah & Richard Smith
Debra Cartwright
Dennis & Rose Forbes
Diane Vincent
Doug & Rita Wagemann
Dr. David & Bonnie Verhaag
Dr. Robert & Dawn Gould

Elizabeth Laverty & Kevin Williamson
Eric & Denise Fiddymont
Gary & Susan Gutowsky
Gary Wraa
Gerald Bice
Gregg Hutchison & Bev Lewis
Gwen Knittweis
Hilde A. Harris
In Memory of Raymond Leroy Richardson
Jack & Gale Wright
Jacqueline Groff
Janet Clark
Jeannette & Kent Liebman
Jennifer Crisologo
Jey & Lynn Yelland
Jim & Judi Gray
Jim Lawrence & Lucinda Chipponeri
Joanne Lozenski
John & Gerlinde Millar
Judi & Leonard Bruckman
Katherine Dona
Kent Frkovich
Kimberley Silvers & Sheila Cardno
Larry & Patricia Payne
Launi Cooper
LeeAnn & Lonnie Dickson
Leilani & Steve Fratis
Linda Holt-Martin & Ken Martin
Lynn & Michael Dean
Lynn Levitt
Lynn L. Reeves
Margaret Martin

Marie Smith
Marilyn Kennedy
Marlene Stoner
Marsha Dashiell
Mary Groesbeck
Mary & David Terrell
Melissa Abramovitz
Meredith Lattin
Mike & Lyn Hutch
Nancy Lackemacher
Nikki Portillo
Pamela Aldrich
Pamela & Thomas Coulter
Pamela Franklin
Patricia Keefe & Darlene Romero
Patricia M. Anderson
Rachel LaForest
Robert & Norma Flautt
Robert & Rita Baikauskas
Sabrina Horat
Scott & Rochelle Butera
Sharon Brown
Shirley Norling
Steve & Jennifer Speak
Steven & MaryAnn Clerici
Susan & Michael Jacobson
Susan & Pete Willson
Sybil Slavin
The Smith Family Trust/Robert G. & Claudia K. Smith
Valerie Story
William & Jennifer Helgren

Interested in joining?

Contact funddevelopment@placerspca.org or call (916) 872-6162



Planning for Your Pet

Ensure lifetime care for your pets through estate planning. The Placer SPCA hosts free workshops throughout the year to educate you on topics like:

- Is a separate pet trust necessary?
- Who should care for my pets as a trustee, and should that person be compensated?
- How much money should I set aside?
- What happens to the trust after my pet's lifetime?

Visit placerspca.org/giving to reserve your spot at our next workshop, or contact funddevelopment@placerspca.org or call (916) 872-6162.

About Placer SPCA

Our mission:

To enhance the lives of companion animals and support the human-animal bond.

Our vision is to ensure that:

- Every adoptable companion animal in Placer County has a home.
- Every lost companion animal in Placer County is reunited with its owner.
- Every dog and cat owner in Placer County has access to affordable spay and neuter services.
- Every companion animal is treated with kindness and respect.

Awarded 4 stars by Charity Navigator for our financial transparency and efficiency. Look us up by tax ID #94-2607682

Learn more at www.placerspca.org



ATTORNEYS



Elise Baker

ESTATE PLANNING ATTORNEY

Company

Placer Law Group, APC

5440 Park Dr., Ste. 102
Rocklin, CA 95765
www.placerlaw.net

Education

- Juris Doctorate, McGeorge School of Law
- B.A. Liberal Studies, California State University Northridge

Specialty

Placer Law Group, APC, provides Estate Planning, Trust, and Probate legal services for individuals, married and unmarried couples, registered domestic partners, and families with young children. For our clients whose families include animals, we will help you gain peace of mind knowing that your estate plan accurately and clearly includes your wishes for the care of those special family members,

Professional Designations

Certified Specialist in Estate Planning, Trust & Probate Law by the State Bar of California Board of Legal Specialization

Schedule a meeting

Your introductory session is complimentary, please contact Elise at:

(916) 632-1930
elise.baker@placerlaw.net



Lindsay Barnes Watkins

ESTATE PLANNING ATTORNEY

Company

Goff Legal, PC

5440 Park Dr., Ste. 102
Rocklin, CA 95765
www.gofflegal.com

Education

- Juris Doctor with distinction, University of the Pacific, McGeorge School of Law
- B.A. Criminal Justice, University of Nevada, Reno

Specialty

- Estate Planning
- Probate
- Trust Administration
- Extensive background in Veterans Affairs planning and a focus on matters that involve court processes

Professional Designations

Licensed Attorney

Schedule a meeting

Please contact Lindsay at:

(916) 625-6556
info@gofflegal.com



Margaret Fulton

ESTATE PLANNING ATTORNEY

Company

Robinson & Fulton Law

One California St.
Auburn, CA 95603
www.fulton-law.com

Education

- Master of Laws in Taxation, McGeorge School of Law
- Juris Doctorate, University of California Hastings College of the Law
- B.A. UC Berkeley

Specialty

- Estate Planning
- Probate
- Trust Administration
- Special Needs Planning

Professional Designations

Certified specialist in Estate Planning, Trust & Probate Law by the State Bar of California Board of Specialization

Schedule a meeting

Your introductory session is complimentary, please contact Margaret at:

(530) 823-2010
staff@fulton-law.com
or visit www.fulton-law.com



Alexandria (Ali) Goff, Esq.

ESTATE PLANNING ATTORNEY

CA STATE BAR #287713

Company

Goff Legal, PC

5440 Park Dr., Ste. 102

Rocklin, CA 95765

www.gofflegal.com

Education

- B.S. California State University, Sacramento
- J.D. University of California, Davis

Specialty

- Estate planning, wills, trusts, and beneficiary designations
- Pet planning including pet trusts
- Trust administration, representing trustees
- Probate, representing executors and administrators

Professional Designations

Licensed attorney and Certified Performance Coach

Schedule a meeting

Your introductory session is complimentary, please contact Alexandria at:

(916) 625-6556

info@gofflegal.com

Or visit www.gofflegal.com



Richard A. Hall

ESTATE PLANNING ATTORNEY

Company

BottomLine Lawyers PC

1234 High Street
Auburn, CA 95603
www.bottomlinelawyers.com

Education

- University of Laverne, Juris Doctor

Specialty

Focus on holistic planning to implement your wishes and avoid conflict. We serve small business and individuals.

Schedule a meeting

Your introductory session is complimentary,
please contact Richard at:

916-297-4373
info@bottomlinelawyers.com



Rick Lebherz

ESTATE PLANNING ATTORNEY

Company

Maxey Kaminski

13 Sierra Gate Plaza, Bldg. B
Roseville, CA 95678
www.lawmk.com

Education

- Law Degree, McGeorge School of Law

Specialty

- Estate Planning
- Probate
- Trust Administration

Schedule a meeting

Your introductory session is complimentary,
please contact Rick at:

916-786-7272



Michelle A. Martin

ESTATE PLANNING ATTORNEY

Company

Goff Legal, PC

P.O. Box 1191
Loomis, CA 95650
www.gofflegal.com

Education

- Juris Doctor, University of the Pacific, McGeorge School of Law
- B.A. Government, International Relations, Sacramento State University

Specialty

- Estate Planning
- Probate
- Trust Administration
- Conservatorship

Professional Designations

Certified Specialist in Estate Planning, Trust and Probate Law
by the State Bar of California Board of Legal Specialization

Schedule a meeting

Please contact Michelle at:

(916) 625-6556
info@gofflegal.com



Amy Ochi

ESTATE PLANNING ATTORNEY

Company

Ochi Law, P.C.

970 Reserve Dr.
Roseville, CA 95678
www.ochilaw.com

Education

- Wake Forest Law School, J.D.
- Macalester College, B.A.

Specialty

- Trust & Estates
- Trust Administration
- Financial Strategies for extended Care

Professional Designations

Certified Specialist in Estate Planning, Trust and Probate Law by the CA State Bar

Schedule a meeting

Your introductory session is complimentary. Mention "Placer SPCA". Please contact Amy at:

(916) 960-2202

amy@ochilaw.com

Or visit www.ochilaw.com



Colleen Watters

ESTATE PLANNING ATTORNEY

CA STATE BAR #256027

Company

Law Office of Colleen J. Watters

641 Fulton Ave., Ste. 200
Sacramento, CA 95864
www.cjwatterslaw.com

Roseville Office:
1100 Melody Lane
Roseville, CA 95678

Education

- Lincoln Law School, Sacramento

Specialty

Colleen assists clients with estate planning, trust administration, and probate with compassion. Colleen's passion is to ensure people have the proper estate planning documents in place which will live into the future. Her goal is to help everyone solve problems in the most efficient and cost-effective manner.

Schedule a meeting

Your introductory session is complimentary, please contact Colleen at:

(916) 225-3570
cj@cjwatterslaw.com



CPAs



Bryan Clarke

CERTIFIED PUBLIC ACCOUNTANT

Company

Mann, Urrutia & Nelson CPAs

2901 Douglas Blvd., Ste. 290
Roseville, CA 95661
www.muncpas.com

Education

- B.S. Business Management, San Francisco State University

Specialty

- Tax Planning
- Strategic Advising
- Return Preparation
- Credits and Incentives
- Business Transactions
- Success Planning

Professional Designations

Certified Public Accountant

Schedule a meeting

Your introductory session is complimentary,
please contact Bryan at:

(916) 774-4208
bcc@muncpas.com



Diane Falzarano

CERTIFIED PUBLIC ACCOUNTANT

Company

Diane Falzarano, CPA

1079 Sunrise Avenue, Ste. B180
Roseville, CA 95661
www.dianefalzarano CPA.com

Education

- Masters in Taxation, Golden Gate University
- B.S. Accounting, Penn State University

Specialty

- Tax return preparation and consulting for individuals
- Estates & trusts
- LLC's
- S & C Corporations

Schedule a meeting

Your introductory session is complimentary,
please contact Diane at:

(916) 786-8707
diane@dianefalzarano CPA.com



Kimberly House

CERTIFIED PUBLIC ACCOUNTANT

Company

Campbell Taylor Washburn

3741 Douglas Blvd. Ste. 350
Roseville, CA 95661
www.campbelltaylorwashburn.com

Education

- B.S. Accounting, California State University Sacramento

Specialty

Audit and assurance services:

- Audit
- Review
- Compilations
- Employee benefit plan audits
- Agreed-upon procedures.

Schedule a meeting

Your introductory session is complimentary,
please contact Kimberly at:

(916) 929-3680
khouse@ctw-cpas.com



FIDUCIARY



Heidi Steinke, Esq.

PRIVATE FIDUCIARY

Company

Heidi Steinke, Esq. Fiduciary

5098 Foothills Blvd., Ste. 3-189
Roseville, CA 95747

Education

- B.A. UCLA
- J.D. McGeorge School of Law

Specialty

- Successor trustee
- Executor
- Agent under a durable power of attorney for finances
- Assistance with bill payment

Professional Designations

Licensed Attorney with focus on providing fiduciary services

Schedule a meeting

Your introductory session is complimentary, please contact Heidi at:

(916) 251-9599
hsfiduciary@gmail.com



Michael F. Storz

PRIVATE FIDUCIARY #387

Company

Storz Fiduciary Services

P.O. Box 4688
Auburn, CA 95604
www.storzfiduciaryservices.com

Education

- B.A. Communication Studies, California State University, Sacramento

Specialty

Trust and probate administrations.

Professional Designations

California Licensed Private Fiduciary

Schedule a meeting

Your introductory session is complimentary, please contact Michael at:

(916) 220-3474
admin@storzfs.com



Barry White

CA LICENSE PROFESSIONAL FIDUCIARY #848

Company

Barry White, Prof. Fiduciary

P.O. Box 10

Applegate, CA 95703

www.barrywfiduciary.com

Professional Designation

- B.S. Business Administration, California State University, Chico
- Prof. Fiduciary Mgmt. Cert., University of California, Riverside

Specialty

Trustee – trust and estate administration services; durable power of attorney agent (financial & health care), personal financial management, veterans payee & court appointed conservator for the person and/or estate.

Schedule a meeting

Your introductory session is complimentary, please contact Barry at:

(530) 305-9036

barrywfiduciary@gmail.com



FINANCIAL PLANNERS



Jon Benecke

FINANCIAL ADVISOR - #OC24309

Company

Edward Jones Investments

1259 Pleasant Grove Blvd., Ste. 150

Roseville, CA 95678

www.edwardjones.com/jonathan-benecke

Education

- M.B.A. Global Business, University of Redlands
- B.S. Business Administration, California Maritime Academy

Specialty

Focusing on individual professionals and local business owners, providing tailored solutions to help achieve their long-term financial goals.

Professional Designations

AAMS® & CRPS®

Schedule a meeting

Consultations are complimentary, please contact Jon at:

(916) 865-4616

jonathan.benecke@edwardjones.com



Kent Bradley

CERTIFIED FINANCIAL PLANNER - #OE56588

Company

WGG Wealth Partners

13620 Lincoln Way, Ste 275
Auburn, CA 95603
www.wggwealthpartners.com

Education

- B.S., University of California, Davis

Specialty

- Retirement Planning Strategies
- Investment Management
- Tax Planning Strategies

Professional Designations

CFP®

Schedule a meeting

Consultations are complimentary,
please contact Kent at:

(916) 677-1640
kenton.a.bradley@ampf.com



Colin Grahl, CFP[®], APMA[®]

PRIVATE WEALTH ADVISOR

Company

WGG Wealth Partners

3741 Douglas Blvd., Ste. 290
Roseville, CA 95661
www.wggadvisorgroup.com

Education

- B.A.A. Accounting/Business Management, Northwood University

Specialty

Comprehensive financial planning for families and small business owners. Specialties include:

- Retirement Income Planning
- Investment Management
- Tax & Estate Planning
- Charitable Giving Strategies

Schedule a meeting

Your introductory session is complimentary,
please contact Colin at:

(916) 677-1640
colin.s.grahl@ampf.com

Ins. #0730404



Charlie Harrison

CERTIFIED FINANCIAL PLANNER - INS. #0188100

Company

Sequoia Advisory Group with United Planners

1225 Pleasant Grove Blvd., Ste. 120
Roseville, CA 95678
www.seqadvisory.com

Education

- B.A. Psychology, California State University Chico

Specialty

We truly care about helping you reach your goals and gaining confidence in your financial life.

- Financial Planning
- Wealth Management

Professional Designations

CFP® (Certified Financial Planner™)

Schedule a meeting

Your introductory session is complimentary, please contact Charlie at:

(916) 783-9100
charlie@seqadvisory.com



Fred Hymans, CFP

FINANCIAL ADVISOR - INS. #0D55562

Company

Essential Financial Strategies

1624 Santa Clara Dr., Ste. 235
Roseville, CA 95661
www.EFSplanning.com

Education

- B.S. Business Administration/Marketing, San Diego State University

Specialty

- Comprehensive financial planning, including retirement and college planning
- Fee-based investment management, life, long-term care, and disability income insurance

Schedule a meeting

Your introductory session is complimentary, please contact Fred at:

(916) 333-2086
fred@EFSplanning.com



Scott Leslie

FINANCIAL ADVISOR

Company

Edward Jones

3007 Douglas Blvd., Ste. 145

Roseville, CA 95661

www.edwardjones.com/scott-leslie

Education

- Finance Degree, Cal Poly
- MBA, San Diego State University

Specialty

"Providing peace of mind to animal owners by helping to develop clear financial plans for themselves and those they love. Proverbs 13:22"

Schedule a meeting

Your introductory session is complimentary, please contact Scott at:

call or text: (916) 201.9982

scott.leslie@edwardjones.com



Damian Lima

FINANCIAL ADVISOR

Company

Edward Jones Investments

6556 Lonetree Blvd., Ste. 100

Rocklin, CA 95765

www.edwardjones.com/damian-lima

Education

- B.A. Journalism, Sacramento State University

Specialty

Comprehensive financial planning with estate emphasis, for both families and business owners. Specialties include:

- Charitable Giving Strategies
- Retirement Income Strategy
- Tax & Estate Planning
- Investment Managment

Professional Designations

AAMS®

Schedule a meeting

Your introductory session is complimentary, please contact Damian at:

(916) 782-0480

damian.lima@edwardjones.com



Ryan Noxon

FINANCIAL PLANNER - INS. #0C24309

Company

Edward Jones Investments

3106 Atherton St., Ste. 120
Rocklin, CA 95675
www.edward-jones.com/ryan-noxon

Education

- Masters in Business Administration - California State University Sacramento

Specialty

"The way I have been most helpful to my clients is by taking the time to personally understand what's most important to them."

- Retirement planning
- Investment management

Schedule a meeting

Your introductory session is complimentary, please contact Ryan at:

(916) 626-4103



Tony Owings

FINANCIAL PLANNER - INS. #0B0879

Company

Legato Financial

4240 Rocklin Rd., Ste. 6

Rocklin, CA 95677

www.legatofinancial.net

Education

- Business Administration, California State University, Chico
- Certificate in Financial Planning, Minnesota State University, Mankato

Specialty

I work closely with individuals, families, and business owners. I help them successfully navigate through the financial events of their lives. My specialties are in divorce financial planning and late-stage college planning.

Professional Designations

CFP® & CDFA®

Schedule a meeting

Your introductory session is complimentary, please contact Tony at:

(916) 580-3025

tony.owings@legatofinancial.net



Monika L. Reyes

PRIVATE WEALTH ADVISOR- INS. #0E14509

Company

WGG Wealth Partners

3741 Douglas Blvd., Ste. 290
Roseville, CA 95661
www.wggwealthpartners.com

Education

- B.S. Business Administration, Sonoma State University

Specialty

- Retirement Planning Strategies
- Retirement Plan Distribution
- Insurance
- Family Finances
- Saving for Education
- Investments
- Domestic Partner Planning
- Charitable Giving
- Tax Planning Strategies

CFP®, CFS®, APMA®, & ChFC®

Professional Designations

Schedule a meeting

Your introductory session is complimentary, please contact Monika at:

(916) 677-1640
monika.l.reyes@ampf.com



Christopher Santi

FINANCIAL PLANNER

INSURANCE SPECIALIST #OG94020

Company

WGG Wealth Partners

3741 Douglas Blvd., Ste. 290

Roseville, CA 95661

www.wggadvisorgroup.com

Education

- University of Wisconsin-Milwaukee
- American College

Specialty

Comprehensive financial planning for families and small business owners.

- Retirement Planning
- Insurance and Protection Planning
- Investment Management
- Tax and Estate Planning
- Charitable Giving Strategies

Professional Designations

CLU®, ChFC®, CLTC®, & APMA®

Schedule a meeting

Your introductory session is complimentary, please contact Christopher at:

(916) 677-1640

christopher.s.santi@ampf.com



Mark Schumacher, CFP®

FINANCIAL PLANNER - INS. #0G27863

Company

Edward Jones Investments

805 Twelve Bridges Rd., Ste. 20
Lincoln, CA 95648
www.edwardjones.com

Education

- B.S. Business Administration, University of Arizona
- CFP® Kaplan University
- ChFC® American College of Financial Services
- AAMS® College of Financial Planning
- CRCP® College of Financial Planning

Specialty

Comprehensive wealth planning, risk management, and investment services tailored to the goals and risk profile of individual investors and business owners.

Professional Designations

CFP®, ChFC®, CRPC®, & AAMS®

Schedule a meeting

Your introductory session is complimentary, please contact Mark at:

(916) 409-9067
mark.schumacher@edwardjones.com



OTHER



Launi Cooper

REVERSE MORTGAGE SPECIALIST - NMLS #582957

Company

Mutual of Omaha Mortgage

915 Highland Point, Ste. 250
Roseville CA 95678
www.mutualreverse.com

Education

- B.S. Business Administration, CSU Sacramento

Specialty

Assisting homeowners 62 and over to implement the strategic use of home equity in retirement income planning.

Schedule a meeting

Your introductory session is complimentary, please contact Launi at:

(916) 343-2211

lcooper@mutualmortgage.com



Renée Perez

RESIDENTIAL REAL ESTATE APPRAISALS

Company

DVS Appraisals, Inc.

2351 Sunset Blvd., Ste. 170-199
Rocklin, CA 95765
www.dvsappraisals.com

Education

- B.S.B.A. Business Marketing, University of Northern Colorado

Specialty

- Estate planning
- PMI Removal
- Divorce & Settlement Disputes
- Tax Assessments
- Bond Appraisals
- Mortgage Lending

Schedule a meeting

Please contact Renée at:

(916) 780-5959
orders@digitalvaluation.com



Kathy Roe

INSURANCE SPECIALIST # 0F42412

Company

More Choices Insurance Agency, LLC

1100 Melody Lane, #1027

Roseville, CA 95678

www.morechoicesinsurance.com

Specialty

Personal and commercial insurance.

Schedule a meeting

Your introductory session is complimentary,
please contact Kathy at:

(916) 889-6600

kathy.insurance4u@gmail.com



Donna Vineyard

BROKER BRE # 00768061

Company

Norcalwest Realty

1079 Sunrise Ave., #B-124

Roseville, CA 95661

www.norcalwestrealtors.com

Professional Designation

- California Real Estate Broker for over 20 years
- Certified Probate/Trusts Real Estate Specialist
- South Placer Estate Planning Council
- Roseville Chamber of Commerce (Annual Speaker)

Specialty

- Real Estate Sales Estate/Trust Real Property Specialist
- Resources for Family & Beneficiaries, 1031 Exchanges, Veterans, Senior Placements, Estate Liquidation, CPA's, Fiduciaries, Surviving Pets, Financial & Charitable Giving Advisors, Elder Law Attorneys, Reverse Mortgages, and Income Property Management

Schedule a meeting

Your introductory session is complimentary, please contact Donna at:

(916) 531-1735

ncwbroker@gmail.com



Doug Wagemann

FUNERAL/CREMATION SERVICES -
FDR#2864 | INSURANCE # 0149635

Company

Cochrane & Wagemann, Funeral Directors

103 Lincoln St.
Roseville, CA 95678
www.cochranewagemann.com

Education

- B.A. Business Management, Cal Poly
- M.B.A. Finance, Cal State San Bernardino

Professional Designation

- Licensed Funeral Director
- Certified Funeral Celebrant
- Certified Cremation/Funeral Executive
- Certified Funeral Service Professional

Specialty

- Funeral/Cremation Services
- Pre-need Arrangements
- Online Arrangements
- Family Owned - Community Focused

Schedule a meeting

You introductory call is complimentary. Please contact Doug Wagemann at (916) 783-7171.

office: (916) 783-7171
dgwagemann@gmail.com

THANK YOU 2023 Corporate Partners

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50 years
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SPCA 

www.PlacerSPCA.org