Placer SPCA's

Planned Giving Professionals Directory

Circle of Hope

If your legacy plan includes Placer SPCA, you can join the Circle of Hope Legacy Society. Members of the Circle of Hope 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.

Melissa Abramovitz
Pamela Aldrich
David Altman
Patricia M. Anderson
Robert & Rita Baikauskas
Barbara Benedict
Gerald Bice
Dale & Faye Bright
Sharon Brown
Judi & Leonard Bruckman
Scott & Rochelle Butera
Kimberley Silvers & Sheila Cardno
Debra Cartwright
Lucinda Chipponeri & Jim Lawrence
Janet Clark
Steven & MaryAnn Clerici
Launi Cooper
Carol Cope
Pamela & Thomas Coulter
David Crawford
Jennifer Crisologo
Marsha Dashiell
Lynn & Michael Dean
Constance Detweiler
LeAnne & Lonnie Dickson
Katherine Dona
Carolyn Eakin
Denise & Eric Fiddyment
Robert & Norma Flautt
Creighton & Nancy Fong
Dennis & Rose Forbes
Pamela Franklin
Leilani & Steve Fratis
Kent Frkovich
Dr. Robert & Dawn Gould
Colin Grahl & Karen Hauber Grahl
Jim & Judi Gray
Mary Groesbeck
Jacqueline Healing-Groff
Gary & Susan Gutowsky
Charlie & Christie Harrison
Carole Haskell
Anne Hauber
William & Jennifer Helgren
Carolyn Hemig
Linda Holt-Martin & Ken Martin
Sabrina Horat
Michael & Lyn Hutch
Susan & Michael Jacobson
Dan & Evelyn Jensen
Louie Kelsey
Patricia Keefe & Darlene Romero
Marilyn Kennedy
David Ketchum
Gwen Knittweis
Pauline & Dennis Kuklis
Nancy Lackemacher
Rachel LaForest
Meredith Lattin
Elizabeth Laverty & Kevin Williamson
Lynn Levitt
Jeannette & Kent Liebman
Joanne Lozenski
Margaret A. Martin
David E. & Lora L. Masche
Cathi Meyers & Laura Brown
Charlene Michelson
John & Gerlinde Millar
Shirley Norling
Shelley & Robert Nunemaker
Ann Palmer
Larry & Patricia Payne
Barbara Pope
Nikki Portillo
Bill & Nancie Radakovitz
Lynn L. Reeves
In Memory of Raymond Leroy Richardson
Sybil Slavin
Deborah & Richard Smith
The Smith Family Trust/Robert G. & Claudia K. Smith
Marie Smith
Barbara Smookler
Steve & Jennifer Speak
Marlene Stoner
Valerie Story
David Tavernetti
Mary & David Terrell
Colleen & John Valentine
Dr. David & Bonnie Verhaag
Diane Vincent
Doug & Rita Wagemann
Colleen Watters
Susan & Pete Willson
Robyn Woody
Gary Wraa
Jack & Gale Wright
Debbie Wrigley
Jey & Lynn Yelland
Carol Zerbo

Current members listed with permission.

Interested in joining? Contact plannedgiving@placerspca.org or call 916.872.6166.

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 plannedgiving@placerspca.org or call (916) 872-6166.

About Placer SPCA

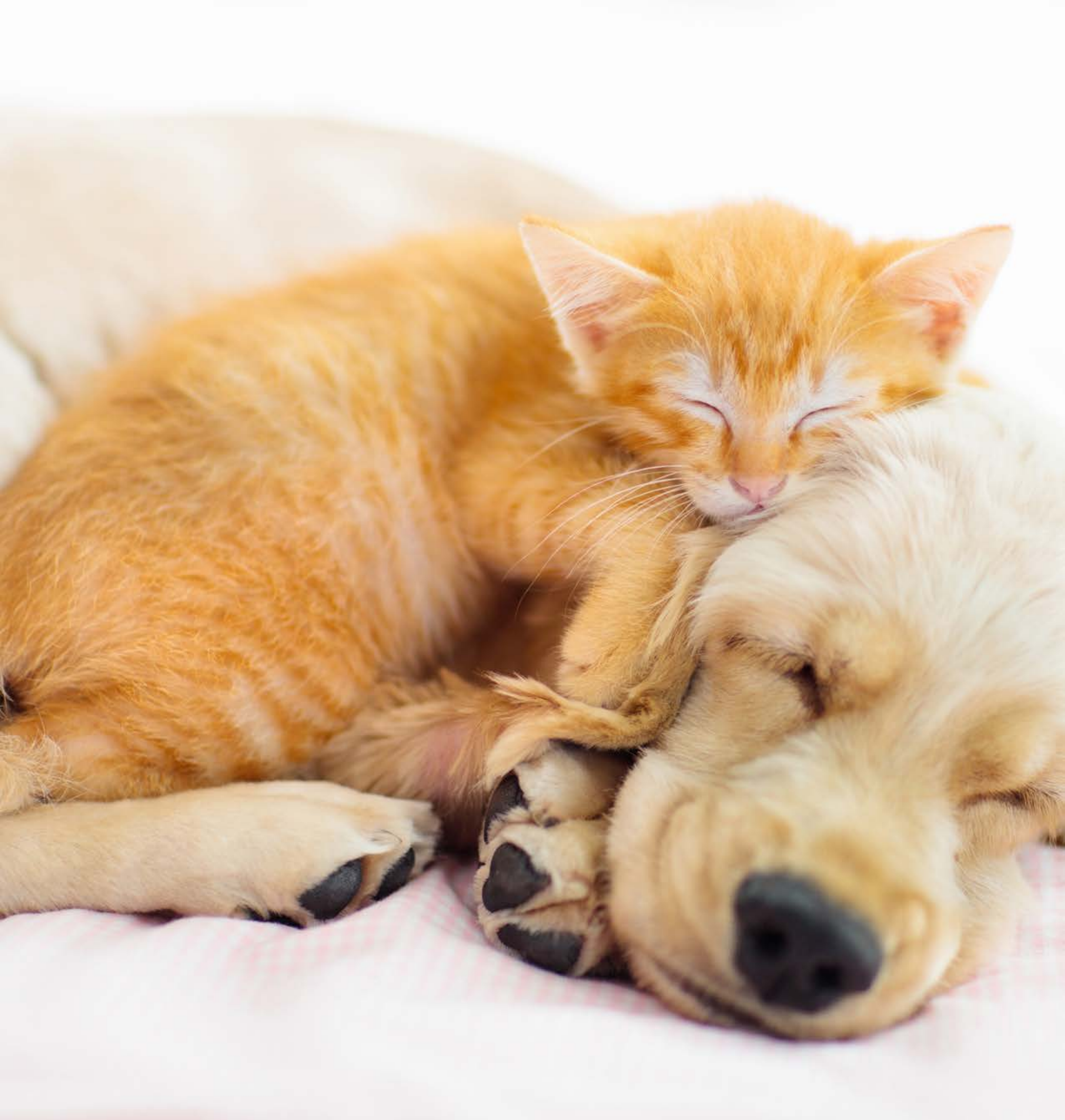
Our mission:
To enhance the lives of companion animals and support the human-animal bond.

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 Schoool 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

Kaminski Law Firm
140 Diamond Creek Place, Suite 165
Roseville, CA 95747
www.californiatrusts.law

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:

916-540-7618

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

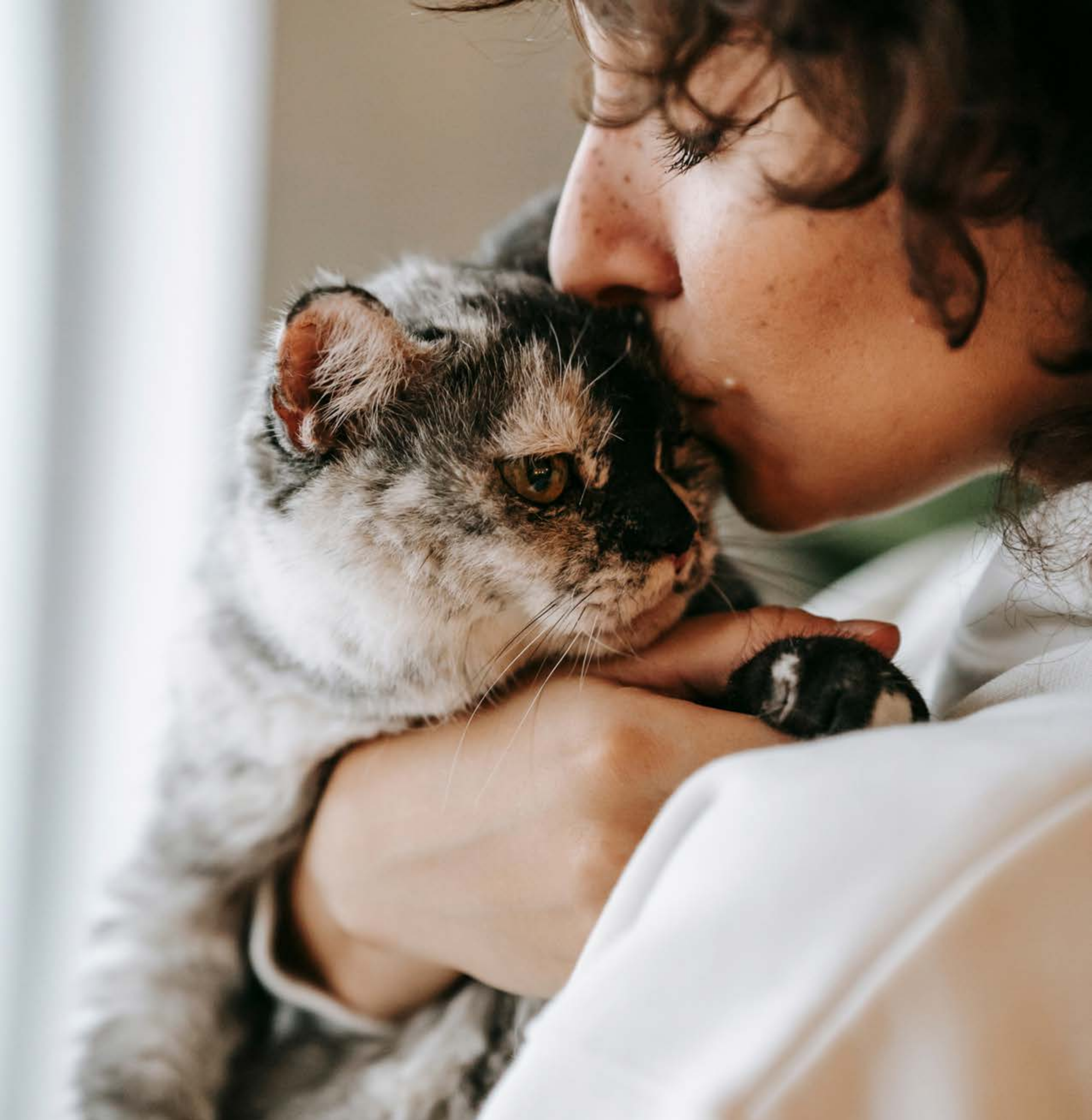
Specialty

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

Jenna Bertuccelli
CERTIFIED PUBLIC ACCOUNTANT

Company

CliftonLarsonAllen (CLA)
915 Highland Pointe Dr., Ste. 300
Roseville, CA 95678
https://www.claconnect.com/en/

Education

- B.S. Accounting, San Diego State University

Specialty

- High net worth individual compliance and planning
- Estate planning
- Nonprofit compliance and consulting

Professional Designations

Certified Public Accountant, CA 119149

Schedule a meeting

Your introductory session is complimentary, please contact Jenna at:

jenna.bertuccelli@claconnect.com

Diane Falzarano
CERTIFIED PUBLIC ACCOUNTANT

Company

Diane Falzarano, CPA
1079 Sunrise Avenue, Ste. B180
Roseville, CA 95661
www.dianefalzaranocpa.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@dianefalzaranocpa.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

Michael R. Johnson

CERTIFIED PUBLIC ACCOUNTANT

Company

Petersen & Maples, LLP
2260 Douglas Blvd., Ste. 290
Roseville, CA 95661
www.p-mcpas.com

Education

- B.S. Business Administration (Accounting), Sonoma State University
- M.S. Taxation, Golden Gate University

Specialty

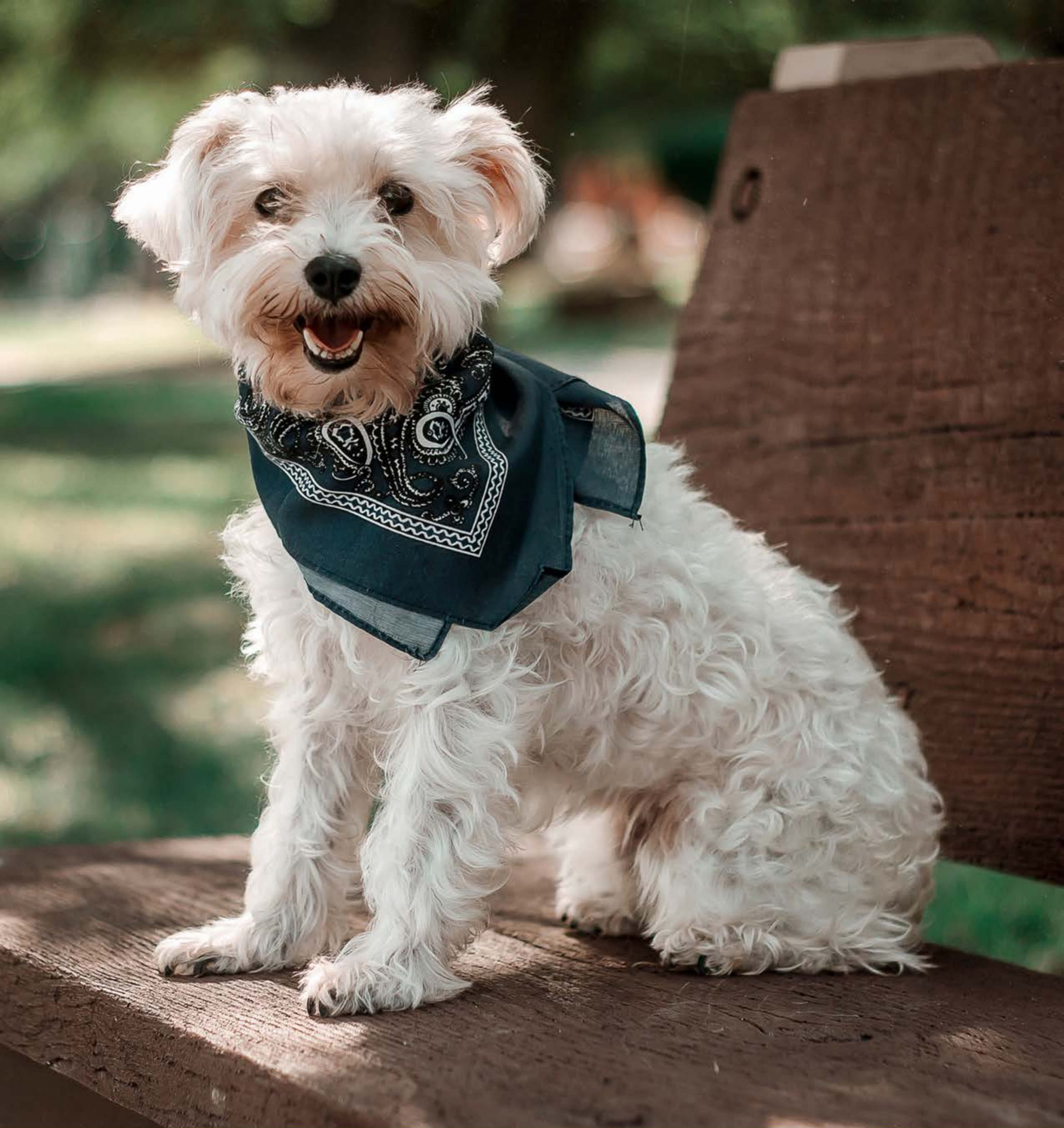
Our services include every level a business individual may need including:

- Individual and Business Consulting
- Tax Return Preparation
- Tax Planning
- Audit Representation
- Bookkeeping Assistance
- Exit Planning
- Independent Financial Statement Compilations and Reviews

Schedule a meeting

Your introductory session is complimentary, please contact Michael at:

(916) 782-3400
michael@p-mcpas.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 1618
Rocklin, CA 95677
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

Shannon Downs

CA LICENSE PROFESSIONAL FIDUCIARY #935

Company

Downs Fiduciary Services
1451 River Park Drive
Suite 121
Sacramento, CA 95815
www.downsfiduciaries.com

Professional Designation

- B.A. Journalism / Sociology, CSU Sacramento

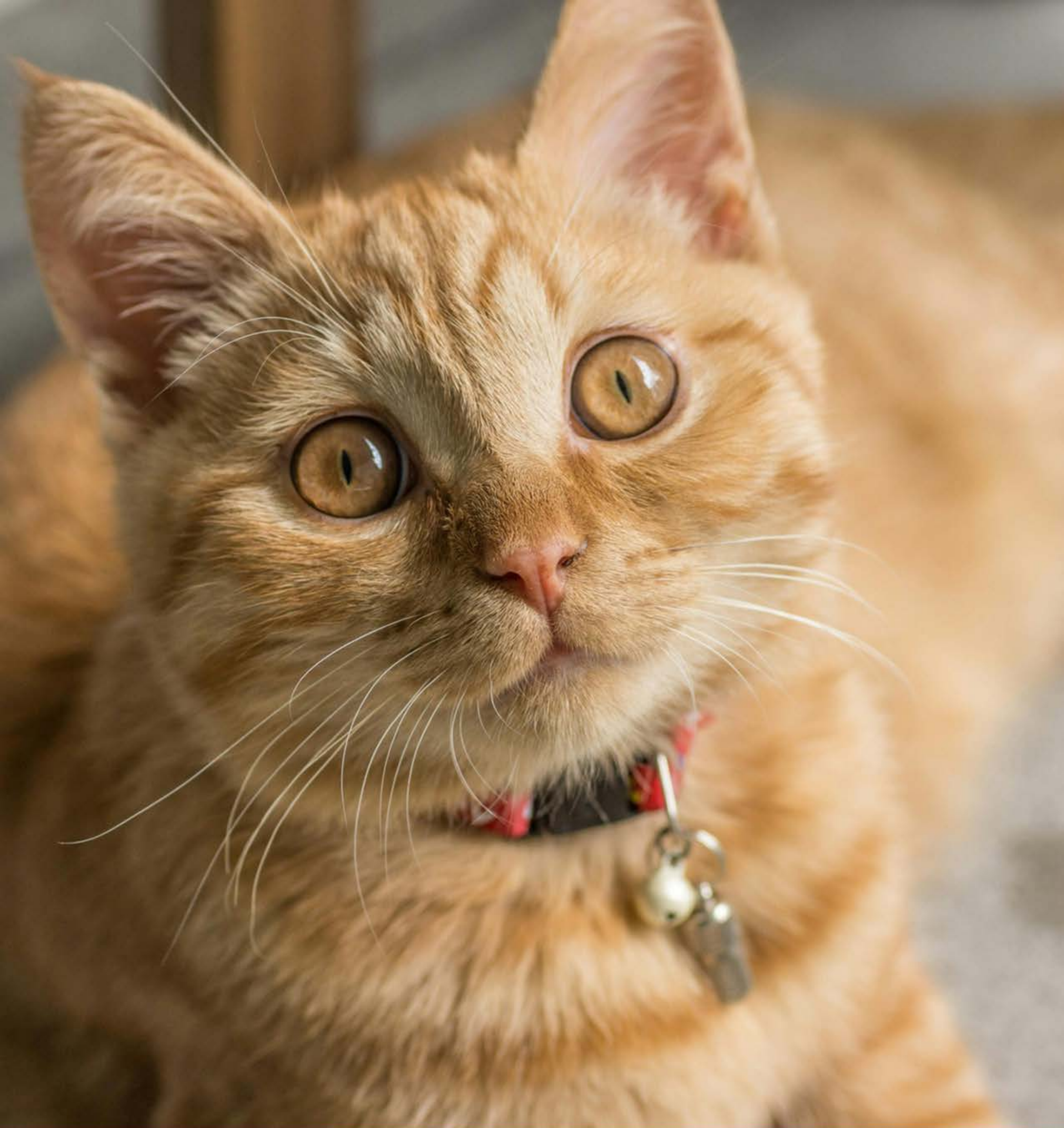
Specialty

Trust Administration; Special Needs Trust Administration; Power of Attorney for Finances; Probate Administrator

Schedule a meeting

Please contact Shannon at:

(916)333-5221
shannon@downsfiduciaries.com



FINANCIAL PLANNERS

Jon Benecke, AAMS®& CRPS®

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, CFP®

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, CFP®

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 overs 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, AAMS®

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, CFP® & CDFA®

CERTIFIED FINANCIAL PLANNER™ - INS. #0B0879
CERTIFIED DIVORCE FINANCIAL ANALYST™

Company

Legato Financial - Raymond James
5701 Lonetree Blvd., Ste 214
Rocklin, CA 95765
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@raymondjames.com

Monika L. Reyes, CFP®, CFS®, APMA™, & ChFC®
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

Professional Designations

CFP®, CFS®, APMA™, & ChFC®

Schedule a meeting

Your introductory session is complimentary, please contact Monika at:

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

Christopher Santi CLU®, ChFC®, CLTC®, & APMA™
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

Mark A. Teh, CSPG, CAP® , AEP®

FINANCIAL PLANNER - INS. #4225992

Company

Mass Mutual
1410 Rocky Ridge Drive, Suite 330
Roseville, CA 95661
financialprofessionals.massmutual.com/mark-a-teh

Education

- B.S. Business Administration, Pacific Union College
- J.D. University of the Pacific, McGeorge School of Law

Specialty

Charitable Giving, Estate Planning, Financial Planning, Insurance Strategies, Business Owners, Retirement Income Planning, Group Benefits, Risk Management Strategies, Business Succession Planning

Professional Designations

CSPG, CAP®, AEP®

Schedule a meeting

Your introductory session is complimentary.
Please contact Mark at:

(916) 510-0616
markteh@financialguide.com

Ashley Wada

FINANCIAL PLANNER - INS. #0M96915

Company

Retirement Wealth Advisors
1504 Eureka Rd., Suite 210
Roseville, CA 95661
www.linkedin.com/in/ashleywada

Education

- Series 7, Series 63, and Series 65 Certifications

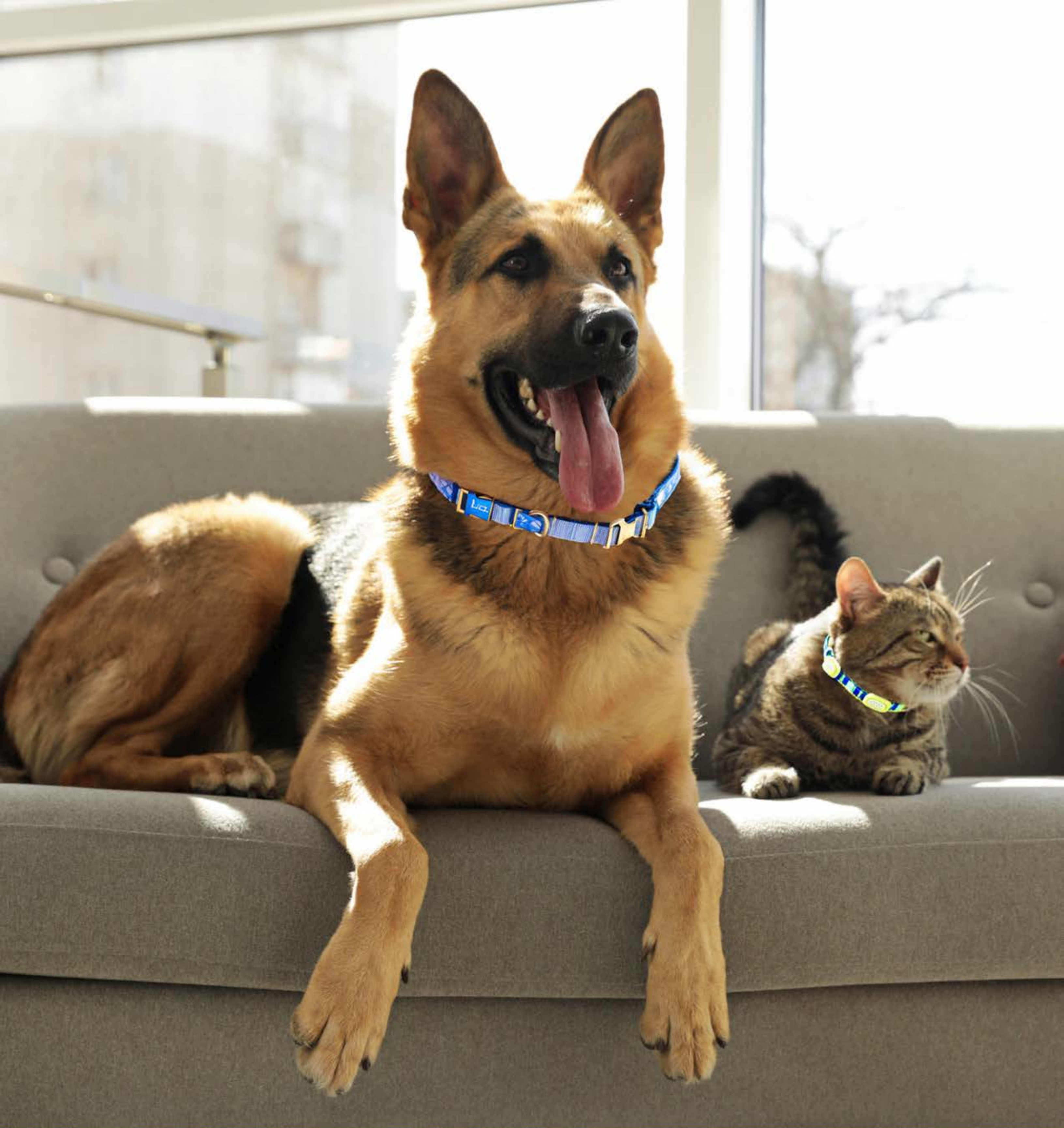
Specialty

Retirement Planning and Inheritance, Notary Public

Schedule a meeting

Your introductory session is complimentary.
Please contact Ashley at:

(916) 772-7350
ashley.wada@LPL.com



OTHER

Launi Cooper

REVERSE MORTGAGE SPECIALIST - NMLS #582957

Company

Mutual of Omaha Mortgage
641 Fulton Ave. #209–209
Sacramento, CA 95825
www.multualreverse.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

Stephanie Brow

COA667

Company

Morgan Oaks Eternal Preserve
421 Fleming Road
Lincoln, CA 95648
www.morganoaksgreenburial.com

Specialty

Morgan Oaks provides families with natural and meaningful memorial landscapes. We're dedicated to creating beautiful and peaceful final resting places for loved ones. Rainbow Bridge serves as a loving interment area dedicated to our cherished pets. Experience the breathtaking beauty of nature's masterpiece at Morgan Oaks.

Schedule a meeting

Your introductory session is complimentary, please call or email Stephanie at:

(916) 298-8883
stephanie@morganoaksgreenburial.com

Kelly Mills Evers

CalRE#: 01854628

Company

Coldwell Banker Realty
2277 Fair Oaks Blvd., Ste. 440
Sacramento, CA 95825
Kelly@KellyEvers.com

Professional Designation

- Realtor

Specialty

Representation of executors and administrators in selling property through probates/trusts; buying and selling luxury properties and income producing residential properties; and 1031 Exchanges.

Schedule a meeting

Your introductory session is complimentary, please call, text or email Kelly at:

(916) 826-1767
kelly@kellyevers.com

Renée Perez

RESIDENTIAL REAL ESTATE APPRAISALS

Company

DVS Appraisals, Inc.
2351 Sunset Blvd., Ste. 170-199
Rocklin, CA 95765
www.dvsapprisals.com

Education

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

Specialty

- Estate planning
- PMI Removal
- Divorce & Settlement Disputes
- Tax Assessments
- Postmortem
- Litigation

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

Steve Romeo

BANKING

Company

Community West Bank
2999 Douglas Blvd., Suite 160
Roseville, CA 95661
www.CVCB.com

Specialty

Commercial banking for small and medium sized businesses. Advising business owners on growing their business successfully.

Schedule a meeting

Your introductory session is complimentary, please contact Steve at:

(916) 716-2014
steve.romeo@cvcb.com

Tiffany Terrell

CORPORATE TRUSTEE/TRUST OFFICER

Company

Exchange Bank
1420 Rocky Ridge Dr., #190
Roseville, CA 95661
www.exchangebank.com

Specialty

Administering complex trust accounts including revocable, irrevocable, charitable, and special needs trusts

Schedule a meeting

Your introductory session is complimentary, please contact Tiffany at:

(916) 782-0138
tiffany.terrell@yahoo.com

Donna Vinnard

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

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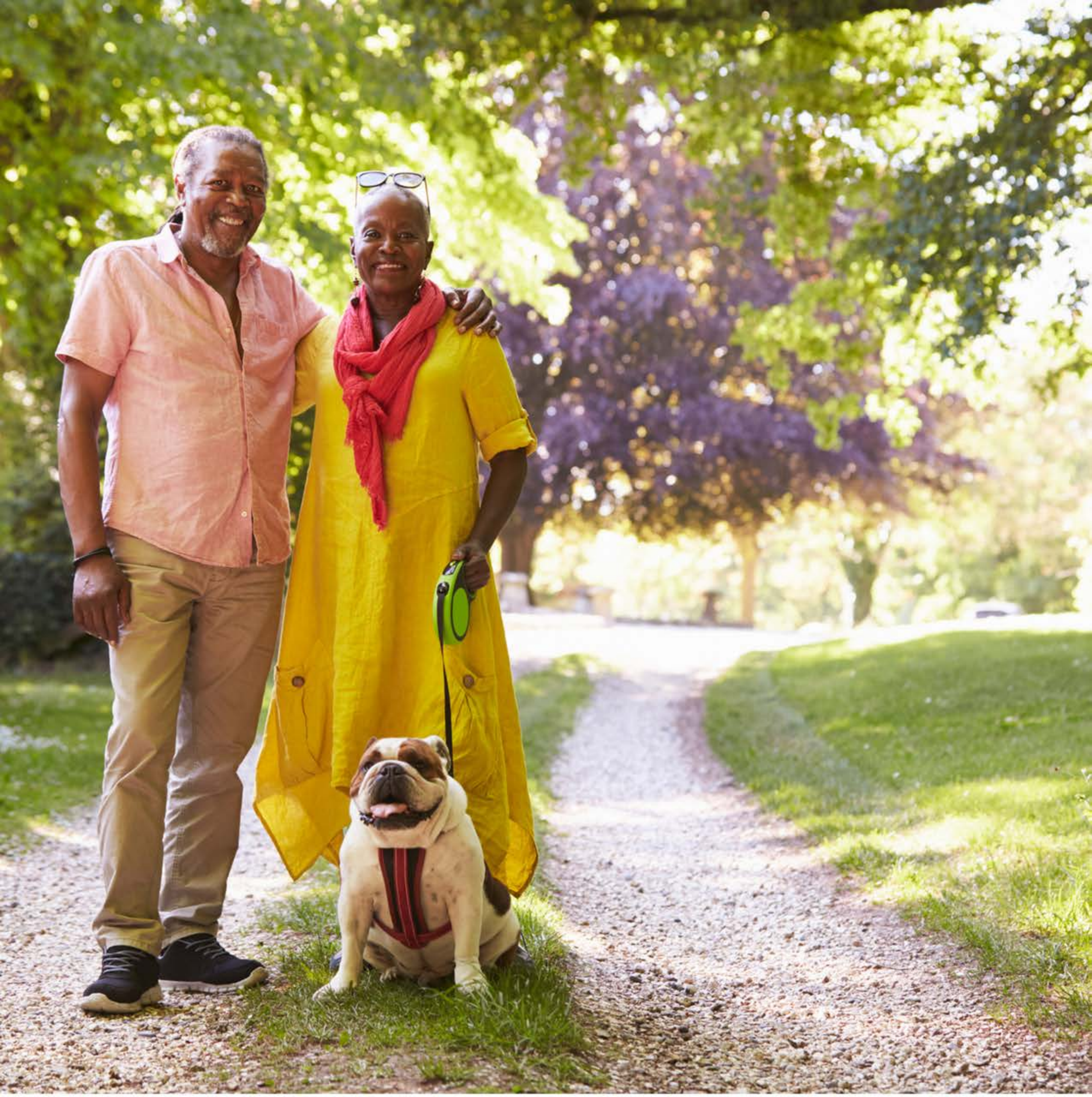

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