



# Placer SPCA's Planned Giving Professionals Directory



A special thanks to our planned giving workshop sponsors:





# 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.**

Andy and Lisa Coro  
Anne Hauber  
Barbara Benedict  
Barbara Pope  
Barbara Smookler  
Beverly Lewis & Gregg Hutchison  
Bill & Nancie Radakovitz  
Carol Cope  
Carol Weaver in honor of Ann Weaver  
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 Altman  
David Crawford  
David E. & Lora L. Masche  
David Ketchum  
David Tavernetti  
Debbie Wrigley  
Deborah & Richard Smith  
Debra Cartwright  
Dennis Barner  
Dennis & Rose Forbes  
Diane Vincent  
Diane Waddell  
Doug & Rita Wagemann  
Dr. David & Bonnie Verhaag  
Dr. Robert & Dawn Gould

Elizabeth Laverty & Kevin Williamson  
Eric and Denise Fiddymont  
Gary & Susan Gutowsky  
Gary Wraa  
Gerald Bice  
Gwen Knittweis  
Hilde A. Harris  
Hunter and Marion DeCarlo  
IMO Raymond Leroy Richarson  
Jack & Gale Wright  
Jacqueline Healing-Groff  
Janet Clark  
Jeannette & Kent Liebman  
Jennifer Crisologo  
Jey and Lynn Yelland  
Jim and 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  
Linda Rothman and Marc Moehlman  
Louie Kelsey  
Lynn & Michael Dean  
Lynn L. Reeves  
Lynn Levitt  
Margaret A. Martin  
Marie Smith  
Marilyn Kennedy  
Marlene Stoner  
Marolyn Woodson Trust

Marsha Dashiell  
Mary Groesbeck  
Mary & David Terrell  
Melissa Abramovitz  
Meredith Lattin  
Michael & Lyn Hutch  
Nancy Lackemacher  
Nikki Portillo  
Pamela Aldrich  
Pamela and Thomas Coulter  
Pamela Franklin  
Patricia Keefe & Darlene Romero  
Patricia M. Anderson  
Paula Righello  
Richard and Judy Fernandez  
Rick and Kim Maness  
Robert & Norma Flautt  
Robert and Rita Baikauskas  
Robert and Shelley Nunemaker  
Robyn Woody & Aydreya Bogeaus  
Scott & Rochelle Butera  
Sabrina Horat  
Sharon Brown  
Sheila Gery  
Sherrie Wilson and John Nightingale  
Shirley Norling  
Stephanie Ranslow  
Steve & Jennifer Speak  
Steven & MaryAnn Clerici  
Stu and Sue Clark  
Susan & Michael Jacobson  
Susan & Pete Willson  
Sybil Slavin  
The Helgren Family Trust  
The Smith Family Trust/Robert G.  
and Claudia K. Smith  
Thomas E. McNair  
Valerie Story

Current members listed with permission.

Interested in joining? Contact [plannedgiving@placerspca.org](mailto: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 protecting your pets through your legacy plan, pet trusts, and charitable gifts that can help animals.

Contact [plannedgiving@placerspca.org](mailto:plannedgiving@placerspca.org) or call (916) 872-6166 to reserve spot at next workshop.

## 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**

HONOR THE COMFORT

A PET  
BRINGS 

with a Legacy Gift to

Placer SPCA 

By including a gift in your will or trust, you ensure that our mission, to enhance the lives of companion animals and support the human-animal bond, continues for generations to come.

Have a question? We can help.

Contact: [plannedgiving@placerspca.org](mailto:plannedgiving@placerspca.org)  
or call 916-872-6166



Learn more: [placerspca.org/giving](https://placerspca.org/giving)



**ATTORNEYS**



# Alexandria (Ali) Goff, Esq.

ESTATE PLANNING ATTORNEY

CA STATE BAR #287713

## Company

### **Goff Legal, PC**

1013 Galleria Blvd Suite 220

Roseville, CA 95678

[www.gofflegal.com](http://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](mailto:info@gofflegal.com)**

**Or visit [www.gofflegal.com](http://www.gofflegal.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](http://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](mailto:cj@cjwatterslaw.com)**



# Elise Baker

ESTATE PLANNING ATTORNEY

## Company

### **Placer Law Group, APC**

3500 Douglas Blvd, Suite 210,  
Roseville, CA 95661  
[www.placerlaw.net](http://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](mailto:elise.baker@placerlaw.net)**



# Hannah David

## ESTATE PLANNING ATTORNEY

### Company

#### Clark Allison, LLP

2520 Douglas Blvd. Suite 160  
Roseville, CA 95661  
[www.clarkallison.com](http://www.clarkallison.com)

### Education

- Lipscomb University, Nashville, TN - B.A.
- Pepperdine University, Malibu, CA - J.D.
- Certificate of Dispute Resolution

### Specialty

Flat Fee Estate planning: wills, trusts, pet trusts, special needs trusts, for individuals & couples, clients with small children; Trust Administration; No forms to fill out, and no billable hours.

### Professional Designations

Licensed Attorney and Certified in Dispute Resolution

### Schedule a meeting

Your introductory session is complimentary, please contact Hannah at:

**(916) 354-5686**  
**[hannah@clarkallison.com](mailto:hannah@clarkallison.com)**



# Jim Filippi

ESTATE PLANNING ATTORNEY

## Company

### **Filippi Law Firm, P.C.**

5701 Lonetree Blvd., Suite 110  
Rocklin, CA 95765  
[www.filippilaw.com](http://www.filippilaw.com)

## Education

- Juris Doctorate, Northwestern California School of Law
- B.S. Business Administration, California Coast University

## Specialty

Estate Planning, Administration, and Litigation, small business consulting, and real estate land use law.

## Professional Designations

Licensed Real Estate Broker in California and Florida

## Schedule a meeting

Your introductory session is complimentary, please contact Jim at:

**(916) 333-7910**  
**[jim@filippilaw.com](mailto:jim@filippilaw.com)**



# Lindsay Barnes Watkins

ESTATE PLANNING ATTORNEY

## Company

### Goff Legal, PC

1013 Galleria Blvd Suite 220  
Roseville, CA 95678  
[www.gofflegal.com](http://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  
Certified Specialist in Estate Planning, Trust and Probate Law  
by the State Bar of California Board of Legal Specialization

## Schedule a meeting

Please contact Lindsay at:

**(916) 625-6556**  
[info@gofflegal.com](mailto:info@gofflegal.com)



# Michelle A. Martin

ESTATE PLANNING ATTORNEY

## Company

### **Goff Legal, PC**

1013 Galleria Blvd Suite 220  
Roseville, CA 95678  
[www.gofflegal.com](http://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](mailto:info@gofflegal.com)**



# Jen Prioriello

ESTATE PLANNING ATTORNEY

## Company

### **Goff Legal, PC**

1013 Galleria Blvd Suite 220  
Roseville, CA 95678  
[www.gofflegal.com](http://www.gofflegal.com)

## Education

- J.D. University of San Diego School of Law,
- B.S University of California , Davis

## Specialty

- Practice includes comprehensive estate planning and estate administration services to individuals and families at every stage of life.

## 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 Jen at:

**(916) 625-6556**  
**[Jen@gofflegal.com](mailto:Jen@gofflegal.com)**



# Richard A. Hall

## ESTATE PLANNING ATTORNEY

### Company

#### **BottomLine Lawyers PC**

1234 High Street  
Auburn, CA 95603  
[www.bottomlinelawyers.com](http://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](mailto:info@bottomlinelawyers.com)



# Stefani Coggins, Esq.

ESTATE PLANNING ATTORNEY

## Company

### **Coggins Legal PC**

4010 Foothills Blvd, Ste 103, PMB 153  
Roseville, CA 95747  
[www.cogginslegal.com](http://www.cogginslegal.com)

## Education

- B.A. Drama, University of California at Irvine
- Juris Doctorate, Pepperdine School of Law

## Specialty

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

## Schedule a meeting

Your introductory session is complimentary, please contact Stefani at:

**(916) 256-4243**  
**[stefani@cogginslegal.com](mailto:stefani@cogginslegal.com)**



**CPAs**



# Jenna Bertucelli

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.bertucelli@claconnect.com](mailto:jenna.bertucelli@claconnect.com)



# Kimberly House

CERTIFIED PUBLIC ACCOUNTANT

## Company

### **Campbell Taylor Washburn**

3741 Douglas Blvd. Ste. 350  
Roseville, CA 95661  
[www.campbelltaylorwashburn.com](http://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](mailto: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](http://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](mailto:michael@p-mcpas.com)**



**FIDUCIARY**



# Barry White

CA LICENSE PROFESSIONAL FIDUCIARY #848

## Company

### **Barry White, Prof. Fiduciary**

P.O. Box 10

Applegate, CA 95703

[www.barrywfiduciary.com](http://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](mailto:barrywfiduciary@gmail.com)**



# 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](http://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](mailto:admin@storzfs.com)**



# Shannon Downs

CA LICENSE PROFESSIONAL FIDUCIARY #935

## Company

### Downs Fiduciary Services

1451 River Park Drive  
Suite 121  
Sacramento, CA 95815  
[www.downsfiduciaries.com](http://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](mailto:shannon@downsfiduciaries.com)**



# Tiffany Terrell

CORPORATE TRUSTEE/TRUST OFFICER

## Company

### Exchange Bank

1420 Rocky Ridge Dr., #190  
Roseville, CA 95661  
[www.exchangebank.com](http://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](mailto:tiffany.terrell@yahoo.com)**



# FINANCIAL PLANNERS



# Ashley Wada

FINANCIAL PLANNER - INS. #0M96915

## Company

### Retirement Wealth Advisors

1504 Eureka Rd., Suite 210  
Roseville, CA 95661  
[www.linkedin.com/in/ashleywada](http://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](mailto:ashley.wada@LPL.com)**



# 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](http://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](mailto:charlie@seqadvisory.com)**



# Colin Grahl, CFP<sup>®</sup>, CAP<sup>®</sup>, APMA<sup>™</sup>

ADVISOR , PERSONAL OFFICE

## Company

### NorthRock Partners

3741 Douglas Blvd., Ste. 290  
Roseville, CA 95661  
[www.northrocksacramento.com](http://www.northrocksacramento.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) 232-4512**  
**[colin.grahl@northrockpartners.com](mailto:colin.grahl@northrockpartners.com)**



# Damian Lima, AAMS®

## FINANCIAL ADVISOR

### Company

#### Edward Jones Investments

6556 Lonetree Blvd., Ste. 100

Rocklin, CA 95765

[www.edwardjones.com/damian-lima](http://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 Management

### Professional Designations

AAMS®

### Schedule a meeting

Your introductory session is complimentary, please contact Damian at:

**(916) 782-0480**

**[damian.lima@edwardjones.com](mailto:damian.lima@edwardjones.com)**



# Fred Hymans, CFP®

FINANCIAL ADVISOR - INS. #0D55562

## Company

### Essential Financial Strategies

1624 Santa Clara Dr., Ste. 235  
Roseville, CA 95661  
[www.EFSplanning.com](http://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](mailto:fred@EFSplanning.com)**



# Kent Bradley, CFP®

ADVISOR, PERSONAL OFFICE

## Company

### NorthRock Partners

3741 Douglas Blvd., Ste. 290  
Roseville, CA 95661  
[www.northrocksacramento.com](http://www.northrocksacramento.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:

**(530) 328-3929**  
**[kent.bradley@northrockpartners.com](mailto:kent.bradley@northrockpartners.com)**



Mark A. Teh, CSPG, CAP<sup>®</sup>, AEP<sup>®</sup>  
FINANCIAL PLANNER - INS. #4225992

## Company

### Mass Mutual

1410 Rocky Ridge Drive, Suite 330

Roseville, CA 95661

[financialprofessionals.massmutual.com/mark-a-teh](http://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<sup>®</sup>, AEP<sup>®</sup>

## Schedule a meeting

Your introductory session is complimentary.  
Please contact Mark at:

**(916) 510-0616**

**[markteh@financialguide.com](mailto:markteh@financialguide.com)**



# Mark Schumacher, CFP®

FINANCIAL PLANNER - INS. #0G27863

## Company

### Edward Jones Investments

805 Twelve Bridges Rd., Ste. 20  
Lincoln, CA 95648  
[www.edwardjones.com](http://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](mailto:mark.schumacher@edwardjones.com)**



Monika L. Reyes, CFP<sup>®</sup>, CFS<sup>®</sup>, APMA<sup>™</sup>, & ChFC<sup>®</sup>  
ADVISOR, PERSONAL OFFICE

## Company

### NorthRock Partners

3741 Douglas Blvd., Ste. 290  
Roseville, CA 95661  
[www.northrocksacramento.com](http://www.northrocksacramento.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<sup>®</sup>, CFS<sup>®</sup>, APMA<sup>™</sup>, & ChFC<sup>®</sup>

## Professional Designations

## Schedule a meeting

Your introductory session is complimentary, please contact Monika at:

**(916) 232-4519**  
**[monika.reyes@northrockpartners.com](mailto:monika.reyes@northrockpartners.com)**



# Ryan Noxon, MBA, CFP, ChFC

FINANCIAL PLANNER - INS. #0C24309

## Company

### Destination Wealth Management

Headquarters:

1255 Treat Blvd., Suite 900

Walnut Creek, CA 94597

<http://www.destinationwm.com>

[rnoxon@destinationwm.com](mailto:rnoxon@destinationwm.com)

## 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:

**(925) 433-6756**



# Scott Leslie

FINANCIAL ADVISOR

## Company

### Edward Jones

3007 Douglas Blvd., Ste. 145

Roseville, CA 95661

[www.edwardjones.com/scott-leslie](http://www.edwardjones.com/scott-leslie)

## Education

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

## Specialty

"Providing peace of mind to animal lovers 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](mailto:scott.leslie@edwardjones.com)**



# 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](http://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](mailto:tony.owings@raymondjames.com)**



**OTHER**



# Donna Hertel

REALTOR | CALBRE # 01742486

## Company

### Century 21 Select Real Estate, Inc\*

7919 Pebble Beach Drive  
Citrus Heights, CA 95610  
DonnaHertel.com

## Professional Designation

- Probate Certified
- Senior Real Estate Specialist awarded by the National Association of Realtors
- Member of South Placer Estate Planning Council
- Founding Member of Blue Ribbon Professional Network
- Refresh and Refurbish Certified through Century 21 Select Real Estate, Inc.

## Specialty

- Over 30 years in animal rescue, offering experience and resources to support families with pets.
- Client interactions grounded in compassion, empathy, understanding, and complete honesty. Focused on listening first to clearly understand needs and goals.
- Founder of a networking group with direct access to a broad range of trusted professionals, service providers, tradespeople, and appraisers.
- Senior Real Estate Specialist (SRES) designation providing guidance tailored to the unique needs of seniors.

## Schedule a meeting

Your introductory session is complimentary.  
Please contact Donna at:

**(916) 613-3696**  
**donna@dannahertel.com**



# Donna Vinnard

BROKER BRE # 00768061

## Company

### Norcalwest Realty

1079 Sunrise Ave., #B-124

Roseville, CA 95661

[www.norcalwestrealtors.com](http://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](mailto: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](http://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

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

**office: (916) 783-7171**  
**[dgwagemann@gmail.com](mailto:dgwagemann@gmail.com)**



# Karen Chappellear

PROFESSIONAL ORGANIZING SERVICES -  
NAPO # 194539

## Company

**Organize for Serenity - Professional Organizing Services**  
[www.organizeforserenity.com](http://www.organizeforserenity.com)

## Education

- Masters in Education - Instructional Technology & Adult Learning Principles

## Professional Designation

- NAPO (National Association of Productivity and Organizing Professionals)
- Keys Guild - Collectables Advising Specialist
- Pinventory - home & Business Inventory Specialist

## Specialty

- Estate Liquidations and Clear-outs using MaxSold local Online Estate Sale Auctions
- Collectables Advising to find the value of a client's potential valuables
- Home & Business Inventory Specialists
- Donate & Discard Services

## Schedule a meeting

Your introductory call is complimentary. Please contact Karen Chappellear at (916) 652-7560.

**[karen@chappellear.com](mailto:karen@chappellear.com)**



# Kelly Mills Evers

REALTOR | 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**



# Kathy Roe

INSURANCE SPECIALIST # 0F42412

## Company

### **More Choices Insurance Agency, LLC**

1100 Melody Lane, #1027

Roseville, CA 95678

[www.morechoicesinsurance.com](http://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](mailto:kathy.insurance4u@gmail.com)**



# Launi Cooper

REVERSE MORTGAGE SPECIALIST - NMLS #582957

## Company

### **Mutual of Omaha Mortgage**

641 Fulton Ave. #209-209  
Sacramento, CA 95825  
[www.mutualreverse.com](http://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](mailto: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](http://www.dvsappraisals.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](mailto:orders@digitalvaluation.com)**



# Stephanie Brow

COA667

## Company

### **Morgan Oaks Eternal Preserve**

421 Fleming Road  
Lincoln, CA 95648  
[www.morganoaksgreenburial.com](http://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](mailto:stephanie@morganoaksgreenburial.com)**



# Tamare A. Fleury

MEDICARE INSURANCE BROKER/LIFE INSURANCE

## Company

**TAF** Insurance Agency  
201 Creekside Ridge Ct. STE 200  
Roseville, CA 95678  
[www.tafiac.us](http://www.tafiac.us)

## Education & Experience

- B.S. Political Science & French Literature
- US Army 12 Years of Service; deployed to Iraq
- Court Reporter for JAG

## Specialty

- Licensed Medicare Broker/Health Insurance Broker/Life
- Insurance providing expert guidance to Medicare beneficiaries.
- Skilled in Medicare Advantage, Supplement, Prescription Drug, and Long-Term Care plans.
- Focus on education, compliance, and personalized plan selection to meet healthcare and financial needs.

## Schedule a meeting

Your introductory session is complimentary,  
To schedule a meeting, mention "Placer SPCA"  
Contact Tamare at:

**(916) 514-3584**  
**[tfleury@tafiac.us](mailto:tfleury@tafiac.us)**