Placer SPCA's
Planned Giving Professionals Directory



A special thanks to our planned giving workshop sponsors:

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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 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
or call 916-872-6166



Learn more: 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

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



Amber Pearce

ESTATE PLANNING ATTORNEY

CA STATE BAR #238235

Company

Law Office of Amber Pearce
P.O. Box 1512
Rocklin, CA 95677
www.amberpearcelaw.com

Education

- J.D., McGeorge School of Law

Specialty

- Estate planning
- Conservatorships
- Probate

Professional Designations

Licensed attorney

Schedule a meeting

Your introductory session is complimentary, please contact Amber at:

(916) 996-5886
amber@amberpearcelaw.com
Or visit www.amberpearcelaw.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



Elise Baker

ESTATE PLANNING ATTORNEY

Company

Placer Law Group, APC
3500 Douglas Blvd, Suite 210,
Roseville, CA 95661
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



Hannah David

ESTATE PLANNING ATTORNEY

Company

Clark Allison, LLP
2520 Douglas Blvd. Suite 160
Roseville, CA 95661
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



Jim Filippi

ESTATE PLANNING ATTORNEY

Company

Filippi Law Firm, P.C.
5701 Lonetree Blvd., Suite 110
Rocklin, CA 95765
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



Lindsay Barnes Watkins

ESTATE PLANNING ATTORNEY

Company

Goff Legal, PC
1013 Galleria Blvd Suite 220
Roseville, CA 95678
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



Michelle A. Martin

ESTATE PLANNING ATTORNEY

Company

Goff Legal, PC
1013 Galleria Blvd Suite 220
Roseville, CA 95678
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



Jen Prioriello

ESTATE PLANNING ATTORNEY

Company

Goff Legal, PC
1013 Galleria Blvd Suite 220
Roseville, CA 95678
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



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



Stefani Coggins, Esq.

ESTATE PLANNING ATTORNEY

Company

Coggins Legal PC
4010 Foothills Blvd, Ste 103, PMB 153
Roseville, CA 95747
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



CPAs



Jenna Bertuccelli

CERTIFIED PUBLIC ACCOUNTANT

Company

Orchid Consulting

Education

- B.S. Accounting, San Diego State University

Specialty

- High net worth individual tax planning
- Estate planning

Professional Designations

Certified Public Accountant, CA 119149

Schedule a meeting

Please contact Jenna at:

jenna@orchidconsultingca.com
(925) 538-9744



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



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



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



Lori Cochrane, CEO

PROFESSIONAL FIDUCIARY FIRM #795

Company

Concierge Fiduciary Services
200 Gateway Drive, Box 855
Lincoln, CA 95648
www.concierge-fiduciary.com

Education

- B.A. Behavioral Psychology
- M.A. California State University, Sacramento

Specialty

- Successor Trustee (Trust)
- Financial Power of Attorney (attorney-in-fact)
- Executor/Administrator (Will)
- Health Care Proxy (Advance Health Care Directive)

Professional Designations

California Licensed Professional Fiduciary Administrator,
Principal Fiduciary, Concierge Fiduciary Services

Schedule a meeting

Your introductory session is complimentary,
please contact Lori at:

(916) 705-7309
info@concierge-fiduciary.com
www.concierge-fiduciary.com/schedule



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



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



Tiffany Terrell, ChSNC

VICE PRESIDENT / SENIOR TRUST OFFICER

Company

Bank of Marin I Wealth Management
3100 Zinfandel Drive, Suite 450
Rancho Cordova, CA 95670
www.bankofmarin.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:

Office: (916) 231-.6745
TiffanyTerrell@bankofmarin.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

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



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



Colin Grahl, CFP®, CAP,® APMA™

ADVISOR , PERSONAL OFFICE

Company

NorthRock Partners
3741 Douglas Blvd., Ste. 290
Roseville, CA 95661
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



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



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



Kent Bradley, CFP®

ADVISOR, PERSONAL OFFICE

Company

NorthRock Partners
3741 Douglas Blvd., Ste. 290
Roseville, CA 95661
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



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



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



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

Company

NorthRock Partners
3741 Douglas Blvd., Ste. 290
Roseville, CA 95661
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

Professional Designations

CFP®, CFS®, APMA™, & ChFC®

Schedule a meeting

Your introductory session is complimentary, please contact Monika at:

(916) 232-4519
monika.reyes@northrockpartners.com



Rebecca Stewart CFP®, ChFC, CRPC

FINANCIAL PLANNER - INS. #OL817747

Company

The Sierra View Group at Morgan Stanley
1478 Stone Point Drive, Roseville, CA 95661

Education

B.A. in Economics, University of California-Santa Cruz

Specialty

Comprehensive financial planning and wealth management for healthcare professionals, business owners, and multi-generational families. Specialties include:

- Estate, Tax, Charitable, and Gift Planning
- Retirement Planning: Income Stream Replacement, Social Security Optimization, Medicare, Roth Conversions
- Tax-Efficient Investment Management, Risk Management, and Wealth Protection Strategies
- Insurance: Life, Disability, Long-Term Care, etc
- Business Succession Planning

Professional Designations: CFP®, ChFC®, CRPC™

Schedule a meeting

Your introductory session is complimentary, please contact Rebecca at:

(916) 797-7794
rebecca.stewart@morganstanley.com



Rikki Foster

FINANCIAL PLANNER - INS. #0162324

Company

RegalStone Wealth Management
1430 Blue Oaks Blvd., Suite 130
Roseville, CA 95747
www.regalstonewealth.com

Education

B.A. University of California-Davis

Specialty

- Tax efficient financial & investment planning
- Retirement planning
- Tax planning
- Business and real estate exit planning

Schedule a meeting

Your introductory session is complimentary, please contact Rikki at:

(916) 775-6205
rikki@regalstonewealth.com
www.regalstonewealth.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

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

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



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



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@donnahertel.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



Karen Chappelear

PROFESSIONAL ORGANIZING SERVICES -
NAPO # 194539

Company

Organize for Serenity - Professional Organizing Services
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 protentional valuables
- Home & Business Inventory Specialists
- Donate & Discard Services

Schedule a meeting

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

karen@chappelear.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

Specialty

Personal and commercial insurance.

Schedule a meeting

Your introductory session is complimentary, please contact Kathy at:

(916) 889-6600
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.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



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



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



Tamare A. Fleury

MEDICARE INSURANCE BROKER/LIFE INSURANCE

Company

TAF Insurance Agency
201 Creekside Ridge Ct. STE 200
Roseville, CA 95678
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