



**DIRECTORY OF ESTATE PLANNING**  
**Professional Service Providers**  
**2009**

250 D Street, Suite 205 • Santa Rosa, CA 95404-4773  
Tel: (707) 579-4073 • Fax: (707) 579-4801 • [www.sonomacf.org](http://www.sonomacf.org)  
For **good**. For **ever**.

## NOTICE TO USERS OF THIS DIRECTORY

Each professional listed in this directory has agreed to provide a free one-hour consultation with any prospective client referred through this directory who is interested in discussing a charitable gift to the Community Foundation or any nonprofit organization. As a prospective client, you may contact the professional directly. Let them know you obtained their name via Community Foundation Sonoma County's *Directory of Estate Planning – Professional Service Providers* and confirm their willingness to provide a one-hour free consultation.

Community Foundation Sonoma County does not guarantee the qualifications or competency of any person listed in this *Directory of Estate Planning – Professional Service Providers* and is not responsible for any errors or omissions of any person listed. Although the Community Foundation has compiled this directory, it has done so based on information supplied by the persons listed. This directory is not a complete listing of all persons with the requisite qualifications or competency, and the omission of others from this directory does not imply a negative assessment or any evaluation or recommendation whatsoever. The Community Foundation strongly recommends that users of this directory conduct their own review of the persons listed in this directory before retaining them to perform any professional services.

If you would like to review more detailed information regarding the professionals listed in this directory, please contact the Community Foundation's office during business hours.

# ***TABLE OF CONTENTS***

|                       |    |                       |    |
|-----------------------|----|-----------------------|----|
| Adams, William L.     | 1  | Jigalin, Andrei       | 6  |
| Allen, Carl           | 1  | Johnson, James D.     | 6  |
| Angell, Diana         | 10 | Kelley, Deberah B.    | 10 |
| Archer, Kathleen      | 11 | Kelm, Bruce A.        | 6  |
| Bailey, Frank R.      | 1  | Ketron, Bruce D.      | 2  |
| Boal, Jeffrey L.      | 9  | Kinney, Deb L.        | 2  |
| Botwinik, Nathan      | 11 | Kitts, Joseph C.      | 4  |
| Bramon, Gary A.       | 5  | Knudson, Thom         | 2  |
| Brock, F. James       | 5  | Kwasneski, Kirsten M. | 2  |
| Brown, Maura          | 5  | Lawrence, MaryClare   | 2  |
| Burger, Richard A.    | 1  | Long, Gary R.         | 6  |
| Burille, Linda        | 10 | Maize, Robert K.      | 2  |
| Byrnes, Anthony J.    | 10 | Marois, Kim           | 2  |
| Carlsen, Phillip D.   | 5  | McGowan, Rita         | 6  |
| Cinquini, George H.   | 11 | Meyers, Lillian M.    | 7  |
| Clarke, Gregg         | 5  | Meyn, John P.         | 9  |
| Cleland, Heather      | 5  | O'Brien, John R.      | 2  |
| Cobert, Nathan        | 5  | Perlman, Alice L.     | 2  |
| Corlett, Deborah G.   | 1  | Pistole, Valerie      | 3  |
| Coston, Bruce         | 5  | Radu, Mary            | 11 |
| Croft, Thomas R.      | 5  | Rapoport, David S.    | 10 |
| Davis, Ann H.         | 1  | Rittenhouse, Jack     | 9  |
| de la Forest, Charles | 1  | Rondon, Brian D.      | 3  |
| DeMeo, Bradford J.    | 1  | Root Jr., Charles J.  | 7  |
| Dolinsek, John        | 9  | Rothenberg, Irwin S.  | 7  |
| Dreyer, Jeffrey M.    | 4  | Rubins, Harry         | 7  |
| Drummond, Daniel A.   | 1  | Sabuco, Valentino     | 7  |
| Dzieza, Bruce         | 6  | Sanford, Alice        | 7  |
| Elliott, Margaret     | 1  | Scheinberg, Paul      | 4  |
| Fishman, William R.   | 1  | Shea, William         | 3  |
| Fritsche, Joni        | 4  | Shindlecker, Tricia   | 3  |
| Gianni, Daniel        | 6  | Sites, Frank R.       | 9  |
| Glazier, Jason        | 6  | Snyder, Cleet E       | 4  |
| Goldberg, Steven M.   | 1  | Sornstein, Edward Z.  | 9  |
| Gorman, Michael       | 6  | Stark, Charles D.     | 3  |
| Gullotta, Richard A.  | 4  | Street, Ronald        | 11 |
| Haeuser, Thomas A.    | 2  | Thurrow, Dieter       | 7  |
| Handelman, Albert G.  | 2  | Walsvick, Mark A.     | 7  |
| Harris, David J.      | 6  | Young, Marlon         | 3  |
| Hobson, Robert L.     | 2  | Zaifman, Mark         | 8  |
| Jacobs, Kenneth S.    | 2  |                       |    |
| Jenkins, Steven T.    | 10 |                       |    |

# ATTORNEYS

**William L. Adams**

Deputy Sonoma County Counsel  
575 Administration Drive, Suite 105A  
Santa Rosa, CA 95403  
(707) 565-2421 – Fax: (707) 565-2624  
email: [badams1@sonoma-county.org](mailto:badams1@sonoma-county.org)

**Carl (Chip) Allen**

466 Patten Street  
Sonoma, CA 95476  
(707) 996-2870 – Fax (707) 996-2870  
Email: [carl\\_allen@sbcglobal.net](mailto:carl_allen@sbcglobal.net)

**Frank R. Bailey, III**

50 Old Courthouse Square, Suite 404  
Santa Rosa, CA 95404  
(707) 525-8850 – Fax: (707) 525-8857  
email: [frank@fbaileylaw.com](mailto:frank@fbaileylaw.com)

**Richard Burger**

Law Offices of Richard Burger  
17 Keller Street  
Petaluma, CA 94952  
(707) 765-6926 – Fax: (707) 765-6089  
email: [richard@richardburger.com](mailto:richard@richardburger.com)

**Deborah G. Corlett**

O'Brien, Watters & Davis, LLP  
3510 Unocal Place, Suite 200  
Santa Rosa, CA 95403  
(707) 545-7010 ext. 427 – Fax: (707) 544-2861  
email: [dcorlett@obrienlaw.com](mailto:dcorlett@obrienlaw.com)

**Ann M. Davis**

Law Offices of Kwasneski & Davis, P.C.  
101 Golf Course Drive, Suite 214  
Rohnert Park, CA 94928  
(707) 586-4180 – Fax: (707) 586-0625  
email: [ann@kwasneski.com](mailto:ann@kwasneski.com)

**Charles P. “Pat” de la Forest**

Law Offices of Charles P. de la Forest  
2213 Mendocino Avenue  
Santa Rosa, CA 95403  
(707) 576-7850 – Fax: (707) 525-9641  
email: [pat@delaforestlaw.com](mailto:pat@delaforestlaw.com)

**Bradford J. DeMeo**

DeMeo DeMeo & West  
565 West College Avenue  
Santa Rosa, CA 95401  
(707) 545-3232 – Fax: (707) 545-1725  
email: [demeo@sonic.net](mailto:demeo@sonic.net)

**Daniel A. Drummond**

Law Offices of Daniel A. Drummond  
576 B Street, Ste. 2F  
Santa Rosa, CA 95401  
(707) 542-3418 – Fax: (707) 542-7418  
email: [dan@drummondlaw.com](mailto:dan@drummondlaw.com)

**Margaret M. Elliott**

Anderson, Zeigler, Disharoon, Gallagher & Gray  
50 Old Courthouse Square, 5<sup>th</sup> Floor  
Santa Rosa, CA 95404  
(707) 545-4910 – Fax: (707) 544-0260  
email: [peggy.elliott@azdgg.com](mailto:peggy.elliott@azdgg.com)

**William R. Fishman**

Law Offices of William R. Fishman  
35 Fifth Street  
Petaluma, CA 94952  
(707) 778-1551 – Fax: (707) 778-7573  
email: [fishesq@runbox.com](mailto:fishesq@runbox.com)

**Steven M. Goldberg**

Friedemann Goldberg LLP  
420 Aviation Boulevard, Suite 201  
Santa Rosa, CA 95403  
(707) 543-4900 – Fax: (707) 543-4910  
email: [sgoldberg@frigolaw.com](mailto:sgoldberg@frigolaw.com)

**Thomas A. Haeuser**  
466 First Street East  
Sonoma, CA 95476  
(707) 996-2131 – Fax: (707) 996-3076  
email: [tahaeuser@vom.com](mailto:tahaeuser@vom.com)

**Albert G. Handelman**  
Spaulding McCullough & Tansil LLP  
90 South E. Street, Suite 200  
Santa Rosa, CA 95404  
(707) 524-1900– Fax: (707) 524-1906  
email: [handelman@smlaw.com](mailto:handelman@smlaw.com)

**Robert L. Hobson**  
Hobson & Hobson  
332 Pine Street, Suite 507  
San Francisco, CA 94104  
(415) 981-5100 – Fax: (415) 981-5805  
email: [rlhobson@msn.com](mailto:rlhobson@msn.com)

**Kenneth S. Jacobs**  
117 North Main Street  
Sebastopol, CA 95472  
(707) 829-7303  
email: [ken@kenjacobs.com](mailto:ken@kenjacobs.com)

**Bruce D. Ketron**  
1700 Second Street, Suite 250  
Napa, CA 94559  
(707) 542-1700 – Fax: (707) 226-2980  
email: [ketron@napanet.net](mailto:ketron@napanet.net)

**Deb L. Kinney**  
DLK Law Group  
1160 North Dutton Ave., Ste. 120  
Santa Rosa, CA 95401  
(707) 237-7371– Fax: (415) 693-0500  
email: [deb@dlklawgroup.com](mailto:deb@dlklawgroup.com)

**Warren Thom Knudson**  
Behrens, Nelson & Knudson  
36 Fifth Street  
Petaluma, CA 94952  
(707) 763-1911 – (707) 763-2177  
Email: [wtknudson@bnklaw.net](mailto:wtknudson@bnklaw.net)

**Kirsten M. Kwasneski**  
Law Offices of Kwasneski & Davis, P.C.  
101 Golf Course Drive, Ste. 214  
Rohnert Park, CA 94928  
(707) 586-4180 – Fax: (707) 586-0625  
Email: [Kirsten@kwasneski.com](mailto:Kirsten@kwasneski.com)

**MaryClare Lawrence**  
Conner, Lawrence & Rodney  
829 Sonoma Avenue, Suite 1  
Santa Rosa, CA 95404  
(707) 523-0480 - Fax: 707-523-2937  
Email: [mlawrence@clrg.com](mailto:mlawrence@clrg.com)

**Robert K. Maize Jr.**  
Robert Maize, a Legal Corporation  
3755 Brickway Boulevard., Suite 200  
Santa Rosa, CA 95403  
(707) 544-4462 – Fax: (707) 544-6402  
email: [robert.m@maizelaw.com](mailto:robert.m@maizelaw.com)

**Kim Marois**  
Law Offices of Kim Marois  
1101 College Avenue, Suite 250  
Santa Rosa, CA 95404-3952  
(707) 545-5500 – Fax: (707) 545-8092  
email: [kmarois@kimmarois.com](mailto:kmarois@kimmarois.com)

**John R. O'Brien**  
O'Brien, Watters & Davis, LLP  
3510 Unocal Place, Suite 200  
Santa Rosa, CA 95403  
(707) 545-7010 – Fax: (707) 544-2861  
email: [jobrien@obrienlaw.com](mailto:jobrien@obrienlaw.com)

**Alice L. Perlman**  
Perlman & Sternfeld, LLP  
90 South E Street, Suite 200  
Santa Rosa, CA 95404  
(707) 525-8577 – Fax: (707) 525-8582  
Email: [apl@sonic.net](mailto:apl@sonic.net)

**Valerie Pistole**

Walter & Pistole  
670 W. Napa Street, Suite F  
Sonoma, CA 95476  
(707) 996-9690 – Fax: (707) 996-9603  
email: [vpistole@walterpistole.com](mailto:vpistole@walterpistole.com)

**Brian D. Rondon**

Law Offices of Brian D. Rondon  
725 College Avenue  
Santa Rosa, CA 95404  
(707) 541-7250 – Fax: (707) 544-8189  
email: [bdrlawoffices@aol.com](mailto:bdrlawoffices@aol.com)

**William Shea**

Law Offices of William Shea  
285 Second Street East  
Sonoma, CA 95476  
(707) 996-6746 – Fax: (707) 939-3590  
Email [wshea57@comcast.net](mailto:wshea57@comcast.net)

**Tricia A. Shindledecker**

Anderson, Zeigler, Disharoon, Gallagher & Gray  
50 Old Courthouse Square, 5<sup>th</sup> Floor  
Santa Rosa, CA 95404  
(707) 545-4910 – Fax: (707) 544-0260  
email: [tricia.shindledecker@azdgg.com](mailto:tricia.shindledecker@azdgg.com)

**Charles D. Stark**

Law Offices of Charles D. Stark  
3510 Unocal Place, Suite 200  
Santa Rosa, CA 95403  
(707) 527-9900 – Fax: (707) 527-7490  
email: [starklaw@sonic.net](mailto:starklaw@sonic.net)

**Marlon Young**

Merrill, Arnone & Jones LLP  
3554 Round Barn Blvd., Ste. 303  
Santa Rosa, CA 95403  
(707) 528-2882 – Fax: (707) 528-6015  
email: [myoung@majlaw.com](mailto:myoung@majlaw.com)

# ACCOUNTANTS

**Jeffrey M. Dreyer**

811 West Napa Street, Suite A  
Sonoma, CA 95476  
(707) 938-2273 – Fax: (707) 938-2361  
email: [dreyer@sonic.net](mailto:dreyer@sonic.net)  
*Professional Licenses/Designations:* CPA

**Joni Fritsche**

Burr Pilger Mayer  
110 Stony Point Rd., Suite 210  
Santa Rosa, CA 95401  
(707) 524-6529 – Fax: (707) 544-2190  
email: [jfritsche@bpmlp.com](mailto:jfritsche@bpmlp.com)  
*Professional Licenses/Designations:* CPA, AEP

**Richard A. Gullotta**

232 W. Napa Street  
Sonoma, CA 95476-6616  
(707) 935-1000 – Fax: (707) 996-3203  
email: [ragullotta@aol.com](mailto:ragullotta@aol.com)  
*Professional Licenses/Designations:* CPA, MBA,  
Estate Planning Certificate

**Joseph Kitts**

Burr Pilger Mayer  
110 Stony Point Road, Suite 210  
Santa Rosa, CA 95401  
(707) 544-4078 – Fax: (707) 544-2190  
email: [jkitts@bpmlp.com](mailto:jkitts@bpmlp.com)  
*Professional Licenses/Designations:* CPA

**Paul Scheinberg**

Boyle & Stoll, CPA's  
3755 Brickway Boulevard, Suite 100  
Santa Rosa, CA 95403  
(707) 571-1951 ext. 113 – Fax: (707) 571-1817  
email: [pscheinberg@boyle-stoll.com](mailto:pscheinberg@boyle-stoll.com)  
*Professional Licenses/Designations:* CPA

**Cleet E. Snyder**

Snyder & Company CPA  
1450 Airport Blvd., Ste. 110  
Santa Rosa, CA 95403  
(707) 545-2026 – Fax: (707) 542-8888  
email: [cleet@snyderandcocpa.com](mailto:cleet@snyderandcocpa.com)  
*Professional Licenses/Designations:* CPA, AEP

# FINANCIAL ADVISORS/PLANNERS

## **Gary A. Bramon**

Alders Financial Solutions  
1701 Novato Blvd., Suite 304  
Novato, CA 94947  
(415) 892-7766 – Fax: (415) 898-6072  
email: [gbramon@aldersfinancial.com](mailto:gbramon@aldersfinancial.com)  
*Professional Licenses/Designations:* Securities, Life & Disability, CLU, ChFC, CA Insurance License #0299839

## **James Brock**

Raub Brock Capital Management, Inc.  
700 Larkspur Landing Circle, Suite 240  
Larkspur, CA 94938  
(415) 927-6990 – Fax: (415) 927-6996  
email: [jimbrock@raubbrock.com](mailto:jimbrock@raubbrock.com)  
*Professional Licenses/Designations:* Registered Investment Advisor

## **Maura Brown**

Registered Representative/Investment Advisor  
MetLife  
120 Stony Point Road, Suite 120  
Santa Rosa, CA 95401  
(707) 545-8353, ext. 108 – Fax: (707) 571-1021  
email: [mbrown3@metlife.com](mailto:mbrown3@metlife.com)  
*Professional Licenses/Designations:* General Securities Registered Principal, NASD Series 6, 7, 9, 10, 63, ChFC, Life, Disability, Variable Contracts, CA Insurance License #0704092

## **Phillip Carlsen**

Ameriprise Financial  
3510 Unocal Place  
Santa Rosa, CA 95403  
(707) 566-9098 – Fax: (707) 566-9545  
email: [phillip.d.carlsen@ampf.com](mailto:phillip.d.carlsen@ampf.com)  
*Professional Licenses/Designations:* Life, CFP, NASD Series 7, CA Insurance License #0763059

## **Gregg Clarke**

Meritas Wealth Management, LLC.  
100 Larkspur Landing Circle, Ste. 110  
Larkspur, CA 94939  
(415) 300-4560 – Fax: (415) 461-4022  
email: [gregg@meritaswealth.com](mailto:gregg@meritaswealth.com)  
*Professional Licenses/Designations:* MBA, CFP

## **Heather Cleland**

Willow Creek Financial Services, Inc.  
825 Gravenstein Highway No., Ste. 5  
Sebastopol, CA 95472  
(415) 300-4560 – Fax: (415) 461-4022  
email: [heather@wcfinc.com](mailto:heather@wcfinc.com)  
*Professional Licenses/Designations:* CFP

## **Nathan Cobert**

Boyer & Cobert Financial Group  
165 N. Redwood Drive, Suite 100  
San Rafael, CA 94903  
(415) 479-1777 Fax: (415) 491-7733  
email: [nathan.cobert@axa-advisors.com](mailto:nathan.cobert@axa-advisors.com)  
*Professional Licenses/Designations:* Insurance, Securities CFP, ChFC, CLU, CA Insurance License #0771063, 0475395

## **Bruce Coston**

ATS Tax & Planning Service  
4860 Old Redwood Highway  
Santa Rosa, CA 95403  
(707) 546-8489 – Fax: (707) 527-8250  
email: [srbruce@sonic.net](mailto:srbruce@sonic.net)  
*Professional Licenses/Designations:* Enrolled Agent, PFP

## **Thomas R. Croft**

Edward Jones Investments  
1611 Terrace Way  
Santa Rosa, CA 95404  
(707) 575-0209 – Fax: (888) 723-8444  
email: [tom.croft@edwardjones.com](mailto:tom.croft@edwardjones.com)  
*Professional Licenses/Designations:* Securities & Insurance, Accredited Asset Management Specialist, CA Insurance License #OC24309



**Bruce J. Dzieza**

Willow Creek Financial Services, Inc.  
825 Gravenstein Highway North, Ste. 5  
Sebastopol, CA 95472  
(707) 829-1146 – Fax: (707) 829-0111  
email: [bruce@wcfsinc.com](mailto:bruce@wcfsinc.com)

*Professional Licenses/Designations:* Real Estate  
Broker, CFP,

**Daniel Gianni**

Raymond James Financial Services  
133 North Street  
Healdsburg, CA 95448  
(707) 431-1650 – Fax: (707)431-1650  
email: [daniel.gianni@raymondjames.com](mailto:daniel.gianni@raymondjames.com)

*Professional Licenses/Designations:* Series 7, 24,  
63, 65, Life and Health Insurance License

**Jason N. Glazier**

Wachovia Securities  
50 Old Courthouse Square, Ste. 110  
Santa Rosa, CA 95404  
(707)521-4214 – Fax (707) 528-9728  
Email: [Jason.Glazier@wachoviasec.com](mailto:Jason.Glazier@wachoviasec.com)

*Professional Licenses/Designations:*  
Series 7, 63, 65-California Life Insurance  
Chartered Retirement Planning Counselor

**Michael Gorman**

Wiiken & Gorman, LLC  
775 Baywood Drive, Suite 306  
Petaluma, CA 94954  
(707)769-0200 Fax: (707) 769-7827  
email: [mgorman@sonic.net](mailto:mgorman@sonic.net)

*Professional Licenses/Designations:*  
Certified Financial Planner, CFP, Series 7, 65

**David J. Harris**

Legacy Solutions  
355 Gemma Circle  
Santa Rosa, CA 95404  
(707) 539-0241 – Fax: (877)727-6172  
email: [davidharris@legacysolutions.net](mailto:davidharris@legacysolutions.net)

**Andrei Jigalin**

Ameriprise Financial  
1208 Fourth Street  
Santa Rosa, CA 95404  
(707) 578-3800 – Fax: (707) 578-4270  
email: [andrei.n.jigalin@ampf.com](mailto:andrei.n.jigalin@ampf.com)

*Professional Licenses/Designations:* CFP, Variable  
Contracts, Series 7, 63, CA Insurance License  
#OB94148

**James Johnson**

Jim Johnson & Associates Inc.  
320 Tenth Street, Suite 303  
Santa Rosa, CA 95401  
(707) 571-0226 – Fax: (707) 843-3967  
email: [Jim@JimJohnsonassociates.com](mailto:Jim@JimJohnsonassociates.com)

*Professional Licenses/Designations:* Registered  
Financial Planner, FINRA Series 6, 24, 63, Life,  
Health, Disability and Variable Insurance Licenses,  
Long Term Care Insurance, CA Insurance License  
#O804457

**Bruce A. Kelm**

Smith Barney  
111 Santa Rosa Avenue, Suite 200  
Santa Rosa, CA 95404  
(707) 571-5722 – Fax: (707) 526-1103  
email: [bruce.kelm@smithbarney.com](mailto:bruce.kelm@smithbarney.com)

*Professional Licenses/Designations:* CFP, Series 7,  
65, Securities Licenses, CA Insurance License  
#OB0490

**Gary R. Long**

Gary R. Long Insurance and Financial Services  
135 Keller St., Suite C  
Petaluma, CA 94952  
(707) 773-3560 – Fax: (707) 765-0181  
email: [glong215@sonic.net](mailto:glong215@sonic.net)

*Professional Licenses/Designations:* CLU,  
Series 6, 22, 65

**Rita McGowan**

P. O. Box 3040  
Santa Rosa, CA 95402  
(707) 542-4402 – Fax: (707) 578-3114  
email: [rmg@sonic.net](mailto:rmg@sonic.net)

*Professional Licenses/Designations:* CFP, RIA, CA  
Insurance License #0692419

**Lillian M. Meyers**

Meyers Financial  
670 West Napa Street, Suite C  
Sonoma, CA 95476  
(707) 935-1124 – Fax: (707) 935-7167  
email: [lillian@meyersfinancial.com](mailto:lillian@meyersfinancial.com)

*Professional Licenses/Designations:* CFP, CDFA, EA, RIA, FINRA Licensing, Series 6, 7, 24, 63, Insurance License # 0809561

**Charles “Chuck” J. Root, Jr.**

Double Eagle Financial  
2300 Bethards Drive, Suite R  
Santa Rosa, CA 95405  
(707) 576-1313 – Fax: (707) 576-1310  
email: [chuck@double-eaglefinancial.com](mailto:chuck@double-eaglefinancial.com)  
*Professional Licenses/Designations:* FINRA/SIPC Registration Series 7.24.63, Registered Principal, LPL Financial, CFP, AEP, CLU, ChFC, Life, Disability and Variable, CA Insurance License #0325654

**Irwin S. Rothenberg**

Wealth Management Consultants, LLC  
3550 Round Barn Boulevard, Suite 212  
Santa Rosa, CA 95403  
(707) 542-3600 – Fax: (707) 542-2900  
email: [irv@wealthmc.com](mailto:irv@wealthmc.com)  
*Professional Licenses/Designations:* CPA, PFS

**Harry Rubins**

Foothill Securities, Inc.  
320 Tenth Street, Suite 304  
Santa Rosa, CA 95401  
(707) 542-9449 – Fax: (707) 542-9450  
email: [hrubins@foothillsecurities.net](mailto:hrubins@foothillsecurities.net)  
*Professional Licenses/Designations:* Securities Registered Principal Series 7, 24 and 63, CA Insurance License #0728447, Ed Slott Master Elite IRA Advisor

**Valentino Sabucco**

Noverus Financial Planning Systems  
979 Golf Course Drive, Suite 273  
Rohnert Park, CA 94928  
(707) 322-1597 – Fax: (707) 584-5833  
email: [vsabucco@noverus.com](mailto:vsabucco@noverus.com)  
*Professional Licenses/Designations:* CFP, RIA, Financial Product Licenses for Education Only; Fee Only Advisor, Life, Variable Annuity, CA Insurance License #0517489, Real Estate

**Alice Sanford**

Sanford, Jigalin & Semour /A financial advisory practice of Ameriprise Financial Services, Inc.  
1208 Fourth Street  
Santa Rosa, CA 95404  
(707) 578-3800 – Fax: (707) 578-4270  
email: [alice.g.sanford@ampf.com](mailto:alice.g.sanford@ampf.com)  
*Professional Licenses/Designations:* CFP, Series 6, 7, 24, 63, CA Life & Variable Contracts

**Dieter E. Thurow**

Thurow Asset Management, Inc.  
3393 Dry Creek Road  
Healdsburg, CA 95448  
(707) 431-8898 – Fax: (707) 431-8896  
email: [dieter@dthurow.com](mailto:dieter@dthurow.com)  
*Professional Licenses/Designations:* CPA, CFP, Real Estate Broker, Registered Investment Advisor, Securities Principal, Health & Life Insurance Agent, CA Insurance License #0740676

**Mark A. Walsvick**

1400 N. Dutton Avenue, Suite 3  
Santa Rosa, CA 95401  
(707) 544-1452 – Fax: (707) 544-1454  
email: [mwalsvick@wsadvise.com](mailto:mwalsvick@wsadvise.com)  
*Professional Licenses/Designations:* Real Estate, Variable Annuity, Life and Disability Insurance, CA Insurance License #0558244, Registered Investment Advisor, Securities Licenses Series 1, 7, 24, 66, CFP, CA Registered Tax Preparer, Teaching Credential in Banking & Finance

**Mark Zaifman**

Spiritus Financial Planning, Inc.

PO Box 1978

Windsor, CA 95492

(707) 237-5212 – Fax: (707) 534-9478

email: [mark@spiritusfinancial.com](mailto:mark@spiritusfinancial.com)

Professional Licenses/Designations: CPA (New Jersey)

# INSURANCE AGENTS

## **Jeffrey L. Boal**

Northwestern Mutual Life Insurance Co.  
149 Stony Circle, Suite 130  
Santa Rosa, CA 95401  
(707) 578-2470 – Fax: (707) 566-0370  
email: [jeff.boal@nmfn.com](mailto:jeff.boal@nmfn.com)  
*Professional Licenses/Designations:* CLU, Life,  
Health, Disability, Annuities and Long Term Care  
Insurance, NASD Series 6, 63, Variable Life and  
Variable Annuities, CA Insurance License #0581616

## **John Dolinsek**

Dolinsek Insurance Services  
2200 Range Avenue, Suite 207  
Santa Rosa, CA 95403  
(707) 544-5493 – Fax: (707) 544-0512  
email: [dolinsek@sonic.net](mailto:dolinsek@sonic.net)  
*Professional Licenses/Designations:* Life, Health  
and Disability, Variable Life and Variable Annuities,  
CA Insurance License # 0547597

## **John P. Meyn**

New York Life  
395 West Napa Street, Suite 6  
Sonoma, CA 95476  
(707) 996-5397 – Fax: (707) 935-6443  
email: [jmeyn@ft.newyorklife.com](mailto:jmeyn@ft.newyorklife.com)  
*Professional Licenses/Designations:* Life and  
Disability; Variable Contracts, CLU, ChFC, CA  
Insurance License # 0490454

## **Jack Rittenhouse**

New York Life Securities, Inc.  
4870 Hoen Avenue  
Santa Rosa, CA 95405  
(707) 539-5535 – Fax: (707) 539-5586  
email: [jrittenhouse@ft.newyorklife.com](mailto:jrittenhouse@ft.newyorklife.com)  
*Professional Licenses/Designations:* NASFD, CA  
Life and Health, CLU, ChFC, AEP, CA Insurance  
License #0471971

## **Frank R. Sites**

The Eagle Group  
4357 Montgomery Drive, Suite D  
Santa Rosa, CA 95405  
(707) 579-4300 – Fax: (707) 579-4358  
email: [fsites@afgweb.com](mailto:fsites@afgweb.com)  
*Professional Licenses/Designations:* CLU, NASD  
Registered Representatiave (Securities), Life,  
Disability Insurance, CA Insurance License  
#0641302

## **Edward Z. Sornstein**

Strategic Financial  
645 Fourth Street, Suite 201  
Santa Rosa, CA 95404  
(707) 526-6602 – Fax: (707) 526-1508  
email: [zed@sonic.net](mailto:zed@sonic.net)  
*Professional Licenses/Designations:* CLU, Life,  
Disability Variable Insurance, CA Insurance License  
#0274090, Registered Representative the Private  
Consulting Group

# FIDUCIARY SERVICES & CORPORATE TRUSTEES

## **Diana Angell**

Assistant Vice President and Trust Officer  
Exchange Bank Wealth Management  
545 Fourth Street  
Santa Rosa, CA 95401  
(707) 524-3113 – Fax: (707) 579-4592  
[angelld@exchangebank.com](mailto:angelld@exchangebank.com)  
*Professional Licenses/Designations:* CFTA

## **Linda Burille**

Vice President and Trust Officer  
Exchange Bank Wealth Management  
545 Fourth Street  
Santa Rosa, CA 95401  
(707) 524-3142 – Fax: (707) 579-4592  
email: [burillel@exchangebank.com](mailto:burillel@exchangebank.com)  
*Professional Licenses/Designations:* CTFA, AEP

## **Anthony J. Byrnes**

Fiduciary  
Byrnes Fiduciary Services  
631 Fifth Street, #206  
Santa Rosa, CA 95404  
(707) 526-6431 – Fax: (707) 526-2826  
email: [Anthony@ajbyrnes.com](mailto:Anthony@ajbyrnes.com)

## **Steven T. Jenkins**

Sr. Vice President and Manager  
Exchange Bank Wealth Management  
545 Fourth Street  
Santa Rosa, CA 95401  
(707) 524-3489 – Fax: (707) 579-4592  
email: [jenkinss@exchangebank.com](mailto:jenkinss@exchangebank.com)  
*Professional Licenses/Designations:* CTFA

## **Deberah B. Kelley**

Vice President & Senior Trust Officer  
Wells Fargo Private Client Services  
3550 Round Barn Blvd., Suite 307  
Santa Rosa, CA 95403  
(707) 521-1238 – Fax: (707) 521-1246  
email: [deberah.b.kelley@wellsfargo.com](mailto:deberah.b.kelley@wellsfargo.com)  
*Professional Licenses/Designations:* CPA, CFP

## **David S. Rapoport**

Vice President  
Exchange Bank Wealth Management  
545 Fourth Street  
Santa Rosa, CA 95401  
(707) 524-3496 – Fax: (707) 579-4592  
email: [rapoportd@exchangebank.com](mailto:rapoportd@exchangebank.com)  
*Professional Licenses/Designations:* CTFA,  
AWMA, AAMS, CMFC

# ALLIED PROFESSIONS

## **Kathleen Archer**

Coldwell Banker Residential Brokerage  
910 Quarry Pointe  
Santa Rosa, CA 95405  
(707) 529-9500 – Fax: (707) 538-1399  
email: [archerk@pacbell.net](mailto:archerk@pacbell.net)

*Occupation:* Realtor

*Professional Licenses/Designations:* CRS, SRES

## **Ronald R. Street**

RE/MAX  
320 College Avenue, Suite 300  
Santa Rosa, CA 95401  
(707) 480-8000 – Fax: (707) 940-4624  
email: [ron@winecountryestates.com](mailto:ron@winecountryestates.com)

*Occupation:* Real Estate Consultant

*Professional Licenses/Designations:* ABR, GRI,  
CRS, SRES

## **Nathan Botwinik**

Home and Acreage Realty  
475 Noonan Ranch Lane  
Santa Rosa, CA 95403  
(707) 569-9404 – Fax: (707) 569-9488  
Email: [Nathan@Homes-Acreage.com](mailto:Nathan@Homes-Acreage.com)

*Occupation:* Real Estate Broker

*Professional Licenses/Designations:* Real Estate  
Broker

## **George H. Cinquini**

Cinquini & Passarino, Inc.  
1360 N. Dutton Avenue, Suite 150  
Santa Rosa, CA 95401  
(707) 542-6268 – Fax: (707) 542-2106  
email: [gcinquini@cinquinipassarino.com](mailto:gcinquini@cinquinipassarino.com)

*Occupation:* Professional Land Surveyor

*Professional Licenses/Designations:* PLS

## **Mary Radu**

Pathmaker Coaching  
2045 Laguna Road  
Santa Rosa, CA 95401  
(707) 824-8836 – Fax: (707) 824-8836  
Email: [Mary@PathmakerCoaching.com](mailto:Mary@PathmakerCoaching.com)

*Occupation:* Life Transition Coach and Philanthropy  
Consultant

*Professional Licenses/Designations:* MSW, CPCC

# GLOSSARY

For your information, here is a glossary of abbreviations used in the directory:

|             |   |
|-------------|---|
| <b>AAMS</b> | <b>Accredited Asset Management Specialist</b>     |
| <b>AWMA</b> | <b>Accredited Wealth Management Advisor</b>       |
| <b>CFP</b>  | <b>Certified Financial Planner</b>                |
| <b>CHFC</b> | <b>Chartered Financial Consultant</b>             |
| <b>CLU</b>  | <b>Chartered Life Underwriter</b>                 |
| <b>CMFC</b> | <b>Chartered Mutual Fund Counselor</b>            |
| <b>CPA</b>  | <b>Certified Public Accountant</b>                |
| <b>CTFA</b> | <b>Certified Trust and Financial Advisor</b>      |
| <b>EA</b>   | <b>Enrolled Agent</b>                             |
| <b>LLC</b>  | <b>Limited Liability Corporation</b>              |
| <b>LLP</b>  | <b>Limited Liability Partnership</b>              |
| <b>MBA</b>  | <b>Master of Business Administration</b>          |
| <b>NASD</b> | <b>National Association of Securities Dealers</b> |
| <b>PC</b>   | <b>Professional Corporation</b>                   |
| <b>PFP</b>  | <b>Personal Financial Planner</b>                 |
| <b>PFS</b>  | <b>Personal Financial Specialist</b>              |
| <b>RIA</b>  | <b>Registered Investment Advisor</b>              |