****

# DIRECTORY OF ESTATE PLANNING

**Professional Service Providers**

**2017**

120 Stony Point Road, Suite 220 • Santa Rosa, CA 95401

Tel: 707.579.4073 Fax: 707.579.4801 • [www.sonomacf.org](http://www.sonomacf.org)

**Invested in the Promise of Sonoma County**

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

Allen, Carl 1

Angell, Diana 11

Archer, Kathleen 12

Aust, Connie 11

Bailey, Frank R. 1

Bernard, Bob 4

Botwinik, Nathan 12

Bramon, Gary A. 5

Brock, F. James 5

Brown, Maura 5

Burger, Richard A. 1

Burille, Linda 11

Byrnes, Anthony J. 11

Callahan, Caren 1

Carlsen, Phillip D. 5

Cinquini, George H. 12

Clarke, Gregg 5

Cleland, Heather 5

Cobert, Nathan 5

Corlett, Deborah G. 1

Coston, Bruce 5

Croft, Thomas R. 5

Crouch, Jeffrey A. 6

Davis, Ann M. 1

de la Forest, Charles 1

DeMartini, James F. 1

Dolinsek, John 10

Dreyer, Jeffrey M. 4

Drummond, Daniel A. 1

Dzieza, Bruce 6

Elliott, Margaret 1

Erskine, Robert 6

Fishman, William R. 1

Fritsche, Joni 4

Gianni, Daniel 6

Glazier, Jason 6

Goldberg, Steven M. 1

Gorbach, Howard R. 6

Gorman, Michael 6

Gullotta, Richard A. 4

Gullotta, Eric S. 1

Haeuser, Thomas A. 2

Hall, Paula S. 2

Handelman, Albert G. 2

Harris, David J. 6

Hobson, Robert L. 2

Hughes, Don R. 11

Ingersoll, Kristen 2

Jacobs, Kenneth S. 2

Jeffrey, Katherine L. 2

Jenkins, Steven T. 11

Jigalin, Andrei 6

Johnson, James D. 6

Kelley, Deberah B. 11

Kelm, Bruce A. 7

Ketron, Bruce D. 2

King, Alice C. 7

Kinney, Deb L. 2

Kitts, Joseph C. 4

Knudson, Thom 2

Kwasneski, Kirsten M. 2

Larsen, Michael 2

Lawrence, MaryClare 2

Long, Gary R. 7

Maize, Robert K. 2

Marois, Kim 3

McGowan, Rita 7

Menjou, Emily 7

Metz, Naomi E. 3

Meyers, Lillian M. 7

Meyn, John P. 10

Neunzig, Brian 7

Norton, Teresa J. 3

O'Brien, John R. 3

Olson, Susan 7

Perlman, Alice L. 3

Pistole, Valerie 3

Radu, Mary 12

Rapoport, David S 11

Rondon, Brian D. 3

Root Jr., Charles J. 7

Rothenberg, Irwin S. 7

Rubins, Harry 8

Sabuco, Valentino 8

Sanford, Alice 8

Scheinberg, Paul 4

Sherman, Spencer D. 8

Shea, William 3

Shindledecker, Tricia 3

Sites, Frank R. 10

Snyder, Cleet E 4

Sornstein, Edward Z. 10

Stark, Charles D. 3

Street, Ronald 12

Thurow, Dieter 8

Valluzzo, Anthony 3

Veal, Matthew 8

Veenstra, Kevin S. 3

Walsvick, Mark A. 8

Wannen, Dale 8

Wargo, Ronald P. 3

Whiting, Leslie 10

Wolcott, Andrea 8 & 11

Young, Marlon 3

Zaifman, Mark 9

Zimmerman, Sharon 9 & 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: badams@sonoma-county.org

**Carl (Chip) Allen**

466 Patten Street

Sonoma, CA 95476

(707) 996-2870 – Fax (707) 996-2870

Email: 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

# Richard Burger

Law Offices of Richard Burger

17 Keller Street

Petaluma, CA 94952

(707) 765-6926 – Fax: (707) 765-6089

Email: richard@richardburger.com

#### Caren Callahan

Attorney at Law

PO Box 15

Ukiah, CA 95482

(707)463-0183 Fax: (707)463-0988

caren@carencallahan.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

#### Ann M. Davis

Law Offices of Kwasneski & Davis, P.C.

2200 Range Avenue, Suite 206

Santa Rosa, CA 95403

(707) 586-4180 – Fax: (707) 586-0625

Email: ann@kwasneski.com

1

#### 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

**James F. DeMartini**

Law Offices of James F. DeMartini

115 West First Street

Cloverdale, CA 95425

(707) 894-5000 – Fax: (707) 894-3127

# 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

# Margaret M. Elliott

Anderson, Zeigler, Disharoon, Gallagher & Gray

50 Old Courthouse Square, 5th Floor

Santa Rosa, CA 95404

(707) 545-4910 – Fax: (707) 544-0260

Email: 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

#### 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

**Eric S. Gullotta**

232 W. Napa Street, Suite A

Sonoma, CA 95476

(707) 938-7234 – Fax: (707) 222-8941

Email: erick@gullottalaw.com

*Professional Licenses/Designations*:

Attorney at Law, CPA, M.S. Taxation

# Thomas A. Haeuser

466 First Street East

Sonoma, CA 95476

(707) 996-2131 – Fax: (707) 996-3076

Email: tom@haeuserlaw.com

**Paula S. Hall**

Law Offices of James F. DeMartini

115 West First Street

Cloverdale, CA 95425

(707) 894-5000 – Fax: (707) 894-3127

Email: paula@cloverdalelaw.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

# Robert L. Hobson

Hobson & Hobson

332 Pine Street, Suite 507

San Francisco, CA 94104

(415) 981-5100 – Fax: (415) 981-5805

Email: rlhobsin@msn.com

**Kristen M. Ingersoll**

Norton & Ingersoll P.C.

200 Fourth Street, Suite 350

Santa Rosa, CA 95401

(707) 230-2644 – Fax: (707) 526-2746

Email: kirsten@noringlaw.com

# Kenneth S. Jacobs

117 North Main Street

Sebastopol, CA 95472

(707) 829-7303

Email: ken@kenjacobs.com

**Katherine L. Jeffrey**

Spaulding McCullough & Tansil LLP

90 South E. Street, Suite 200

Santa Rosa, CA 95404

(707)524-1900 – Fax: (707)524-1906

Email: Jeffrey@smlaw.com

2

# Bruce D. Ketron

1700 Second Street, Suite 250

Napa, CA 94559

(707) 542-1700 – Fax: (707) 226-2980

Email: 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

**Warren Thom Knudson**

Behrens, Nelson & Knudson

36 Fifth Street

Petaluma, CA 94952

(707) 763-1911 – (707) 763-2177

Email: wtknudson@bnklaw.net

**Kirsten M. Kwasneski**

Law Offices of Kwasneski & Davis, P.C.

2200 Range Avenue, Suite 206

Santa Rosa, CA 95403

(707) 586-4180 – Fax: (707) 586-0625

Email: Kirsten@kwasneski.com

**Michael Larsen**

Law Offices of Michael D. Larsen

131-A Stony Circle, Suite 500

Santa Rosa, CA 95401

(707) 578-2310 – Fax: (707) 540-6256

Email: michael@larsenlaw.net

**MaryClare Lawrence**

Conner, Lawrence & Rodney

Collaborative Practice Center

829 Sonoma Avenue, Suite 1

Santa Rosa, CA 95404

(707) 523-0480 – Fax: 707-523-2937

Email: Mlawrence@clr.829.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

# Kim Marois

Clement, Fitzpatrick & Kenworthy

3333 Mendocino Avenue

Santa Rosa, CA 95403

(707) 523-1181 – Fax: (707) 546-1360

Email: kmarois@cfk.com

**Naomi E. Metz**

Law Offices of Naomi E. Metz

122 Calistoga Road, #345

Santa Rosa, CA 95409

(707) 843-3570

Email: Naomi@naomimetzlaw.com

**Teresa J. Norton**

Norton & Ingersoll, P.C.

200 Fourth Street, Suite 350

Santa Rosa, CA 95401

(707) 230-2644 – Fax: (707) 521-0401

Email: teresa@moringlaw.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

**Alice L. Perlman**

Perlman & Sternfeld, LLP

90 South E Street, Suite 200

Santa Rosa, CA 95404

(707) 525-8577 – Fax: (707) 525-8582

Email: aplaw@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

# 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

3

**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

# Tricia A. Shindledecker

Law Offices of Trisha A. Shindledecker

3554 Round Barn Blvd., Suite 312

# Santa Rosa, CA 95403

(707) 284-1424 – Fax: (707) 284-1428

Email: tricias@estatepath.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

**Anthony Valluzzo**

Anderson, Zeigler, Disharoon. Gallagher and Gray

50 Old Courthouse Square, 5th Floor

Santa Rosa, CA 95404

(707) 545-4910 – Fax: (707) 544-0260

Email: anthony.valluzzo@azdgg.com

**Kevin S. Veenstra**

Sonoma Law Group

445 Orchard Street, Suite 204

Santa Rosa, CA 95404

(707) 284-8844 – Fax: (707) 284-8850

Email: kveenstra@sonomalawgroup.com

**Ronald P. Wargo II**

Friedemann Goldberg LLP

420 Aviation Boulevard, Suite 201

Santa Rosa, CA 95403

(707) 543-4900 – Fax: (707) 543-4910

Email: rwargo@frigolaw.com

#### 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

Accountants

**Bob Bernard**

Brush Bernard Mitchell CPA’s

101 W. North Street

Healdsburg, CA 95448

(707) 433-8800 – Fax: (707) 433-4123

Email: bob@bbmcpa.com

*Professional Licenses/Designations*: CPA, Certified Management Accountant

**Jeffrey M. Dreyer**

811 West Napa Street, Suite A

Sonoma, CA 95476

(707) 938-2273 – Fax: (707) 938-2361

Email: 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@bpmllp.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

*Professional Licenses/Designations*: CPA, MBA, Estate Planning Certificate

4

# Joseph Kitts

Burr Pilger Mayer

110 Stony Point Road, Suite 210

Santa Rosa, CA 95401

(707) 544-4078 – Fax: (707) 544-2190

Email: jkitts@bpmllp.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

*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

*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

*Professional Licenses/Designations*: Securities, Life & Disability, CLU, ChFC, CA Ins. 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

*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

*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

*Professional Licenses/Designations*: Life, CFP, NASD Series 7, CA Insurance License #0763059

5

**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

*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@wcfsinc.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

*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

*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

*Professional Licenses/Designations:* Securities & Insurance, Accredited Asset Management Specialist, CA Insurance License #OC24309

**Jeffrey A. Crouch**

Edward Jones

5761 Mountain Hawk Drive, Suite 101

Santa Rosa, CA 95409

(707) 537-0200

Email: jcrouch1@gmail.com

*Professional Licenses/Designations:* Finra Series 7, 63 & 65, CA Insurance License#0C66635

**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

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

**Robert Erskine**

Erskine Investment Management

19449 Riverside Drive, Suite 202

Sonoma, CA 95476

(707) 939-3722 – Fax: (707) 939-3725

Email: robert.erskine@lpl.com

*Professional Licenses/Designations:* Series 06, 07, 24, 63, 66

**Daniel Gianni**

Raymond James Financial Services

133 North Street

Healdsburg, CA 95448

(707) 431-1650 – Fax: (707) 431-1650

Email: Daniel.gianni@raymondjames.com

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

**Jason N. Glazier**

Strategic Planning & Investment Advisors

100 E Street #106

Santa Rosa, CA 95404

(707) 247-4414 –

Email: jason.glazier@ampf.com

*Professional Licenses/Designations:*

Series 7, 63, 65, California Life Insurance #0E19249

Accredited Domestic Partnership AdvisorSM

Chartered Retirement Planning Counselor

6

**Howard R. Gorbach**

HR Gorbach/Lincoln Financial Services

19401 Sleepy Hollow Court

Sonoma, CA 95476

(707) 996-4679 – Fax: (707) 935-3905

Email: hgorbach@comcast.net

*Professional Licenses/Designations:* Series 6, 7, 26, LUTCF

**Michael Gorman**

Wiiken & Gorman, LLC

775 Baywood Drive, Suite 306

Petaluma, CA 94954

(707) 769-0200 – Fax: (707) 769-7827

Email: 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

#### Andrei Jigalin

Ameriprise Financial

1208 Fourth Street

Santa Rosa, CA 95404

(707) 578-3800 – Fax: (707) 578-4270

Email: andrei.n.jigalin@ampf.com

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

**James Johnson**

Jim Johnson & Associates Inc.

2425 Cleveland Avenue, Suite 220

Santa Rosa, CA 95403-2973

(707) 571-0226 – Fax: (707) 843-3967

Email: 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**

Morgan Stanley Wealth Management

3562 Round Barn Circle, 1st Floor

Santa Rosa, CA 95403

(707) 571-5722 – Fax: (707) 524-1099

Email: bruce.kelm@morganstanley.com

*Professional Licenses/Designations*: CFP, Series 7, 65, Securities Licenses, CA Insurance License #OB04907

**Alice C. King**

Wine Country Wealth Management, LLC

755 Baywood Drive, 2nd Floor

Petaluma, CA 95494

(707) 933-1549 – Fax: (707-939-9483

Email: alice@winecountrywealthmanagement.com

Registered Investment Adviser (firm) and Registered Investment Adviser Representative (owner). Licensed in the States of California and Texas; previously held active license with California State Bar Association (1987 to 2001).

**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

*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

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

# Emily Menjou

# Exchange Bank

# P.O. Box 208

# Santa Rosa, CA 95402

# (707) 522-2361 – Fax: (707) 579-4592

Email: emily.menjou@exchangebank.com

*Professional Licenses/Designations:* Certified Trust and Financial Advisor

7

# 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

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

**Brian Neunzig**

Graystone Consulting

3562 Round Barn Circle, 1st Floor

Santa Rosa, CA 95403

(707) 571-5744 – Fax: (707) 524-1099

Email:Brian.neunzig@msgraystone.com

*Professional Licenses/Designations*: CFP, CIMA

**Susan Olson**

Fee Only Financial Advisor

Abacus Wealth Partners

101 South Main Street

Sebastopol, CA 95472

(707-861-8004

Email: susan@abacuswealth.com

*Professional Licenses/Designations:* CPA, Finra Series 65

**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

*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

*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

*Professional Licenses/Designations:* Securities Registered Principal Series 7, 24 and 63, CA Insurance License #0728447, Ed Slott Master Elite IRA Advisor

**Valentino Sabuco**

The Financial Awareness Foundation

979 Golf Course Drive, Suite 273

Rohnert Park, CA 94928

(707) 322-1597

Email: v.sabuco@TheFinancialAwarenessFoundation.org

*Professional Licenses/Designations:* CFP, AEP, 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

*Professional Licenses/Designations:* CFP, Series 6, 7, 24, 63, CA Life & Variable Contracts

**Spencer D. Sherman**

Abacus Wealth Partners

7182 Healdsburg Avenue

Sebastopol, CA 95472

(707) 829-6190 – Fax: (707) 829-6192

Email: info@abacuswealth.com

*Professional Licenses/Designations:* CFP

8

**Dieter E. Thurow**

Thurow Asset Management, Inc.

239 Center Street, Suite A

Healdsburg, CA 95448

(707) 431-8898 – Fax: (707) 431-8896

Email: dieterthurow@gmail.com

*Professional Licenses/Designations:* CPA, CFP, Real Estate Broker, Registered Investment Advisor, Securities Principal, Health & Life Insurance Agent, CA Insurance License #0740676

**Matthew J. Veal**

Graystone Consulting

3562 Round Barn Circle, 1st Floor

Santa Rosa, CA 95403

(707) 571-5720 – Fax: (707) 571-5775

Email:Matthew.veal@msgraystone.com

*Professional Licenses/Designations:* CFP 2004

# Mark A. Walsvick

1400 N. Dutton Avenue, Suite 3

Santa Rosa, CA 95401

(707) 544-1452 – Fax: (707) 544-1454

Email: mwalsvick@wsadvise.com

*Professional Licenses/Designations:* Real Estate, Variable Annuity, Life and Disability Insurance, CA Insurance License #0558244, Securities Registrations Series 1, 7, 24, 66, CFP, CA Registered Tax Preparer, Teaching Credential in Banking & Finance. Securities offered through LPL Financial, Member FINRA/SIPC

**Dale Wannen**

Sustainvest Asset Management, LLC

555 Maria Drive

Petaluma, CA 94954

(707) 766-9480 – Fax: (707) 773-5006

Email: dale@sustainvestmanagement.com

*Professional Licenses/Designations*: Series 65

**Andrea Wolcott**

Wolcott Financial Solutions

1083 Vine Street, Suite 122

Healdsburg, CA 95448

(707) 433-3311

andrea@wolcottfinancialsolutions.com

*Professional Licenses/Designations:* CFP, PFAC

**Mark Zaifman**

Spiritus Financial Planning, Inc.

PO Box 1978

Windsor, CA 95492

(707) 237-5212 – Fax: (707) 534-9478

Email: mark@spiritusfinancial.com

*Professional Licenses/Designations*: CPA (New Jersey)

**Sharon Zimmerman**

Northwestern Mutual Wealth Management & Co.

1049 Fourth Street, Suite I

Santa Rosa, CA 95404

(707) 578-2477 – Fax: (707) 566-0370

Email: sharon.zimmerman@nm.com

*Professional Licenses/Designations:* CLU, CHFC, CASL.

9

Insurance Agents

# John Dolinsek

Dolinsek Insurance Services

PO Box 1206

Santa Rosa, CA 95402-1206

(707) 544-5493 – Fax: (707) 544-0512

Email: dolinsek@sonic.net

*Professional Licenses/Designations:* Life, Disability Annuities, Long Term Care, Variable Life & 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

*Professional Licenses/Designations:* Life and Disability; Variable Contracts, CLU, ChFC, CA Insurance License # 0490454

**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

*Professional Licenses/Designations*: CLU, NASD Registered Representatiave (Securities), Life, Disability Insurance, CA Insurance License #0641302

10

#### 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

*Professional Licenses/Designations*: CLU, Life, Disability Variable Insurance, CA Insurance License #0274090, Registered Representative the Private Consulting

**Leslie Whiting**

Long Term Care Options

501 Sundretto Drive

Sebastopol, CA 95472

(866) 446-5824 – Fax: (707) 721-1242

Email: lesliewhiting@comcast.net

*Professional Licenses/Designations:* Life, Disability Annuities, Long Term Care, Variable Life & Variable Annuities, CA Insurance License # 0898471

**Sharon Zimmerman**

Northwestern Mutual Wealth Management & Co.

1049 Fourth Street, Suite I

Santa Rosa, CA 95404

(707) 578-2477 – Fax: (707) 566-0370

Email: sharon.zimmerman@nm.com

*Professional Licenses/Designations:* CLU, CHFC, CASL.

## 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

Email: angelld@exchangebank.com

*Professional Licenses/Designations*: CTFA

# Connie Aust

Licensed Fiduciary

Director of Social & Financial Services

Council on Aging

30 Kawana Springs Road

Santa Rosa, CA 95404

(707) 525-0143 ext. 108 – Fax: (707) 525-0454

Email: caust@councilonaging.com

# 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

*Professional Licenses/Designations:* CTFA, AEP

# Anthony J. Byrnes

Private Fiduciary

Byrnes Fiduciary Services

610 Beaver Street

Santa Rosa, CA 95404

(707) 526-6431 – Fax: (707) 526-2826

Email: Anthony@ajbyrnes.com

**Don R. Hughes, CLPF**

Hughes Fiduciary Services

P.O. Box 1004

Cloverdale, CA 95425

(707) 536-7786 – Fax: (707-637-8164

Email: Hughedon@gmail.com

*Professional Licenses/Designations:* PF 104

11

**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

*Professional Licenses/Designations*: CTFA

# Deberah B. Kelley

Executive Vice President of Wealth Management

Mechanics Bank

1111 Civic Dr., Suite 333

Walnut Creek, CA 94596

(925) 256-3033

Email: Debbie\_Kelley@mechanicsbank.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

*Professional Licenses/Designations*: CTFA, AWMA, AAMS, CMFC

**Andrea Wolcott**

Wolcott Financial Solutions

1083 Vine Street, Suite 122

Healdsburg, CA 95448

(707) 433-3311

andrea@wolcottfinancialsolutions.com

*Professional Licenses/Designations:* CFP, PFAC

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

*Occupation*: Realtor

*Professional Licenses/Designations*: 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

*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

*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

*Occupation*: Life Transition Coach and Philanthropy Consultant

*Professional Licenses/Designations:* MSW, CPCC

12

**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

Occupation: Real Estate Consultant

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

Glossary

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

 **AAMS Accredited Asset Management Specialist**

 **AWMA Accredited Wealth Management Advisor**

###### CFP Certified Financial Planner

**CHFC Chartered Financial Consultant**

**CIMA Certified Investment Management Analyst**

**CLU Chartered Life Underwriter**

**CMFC Chartered Mutual Fund Counselor**

**CPA Certified Public Accountant**

**CTFA Certified Trust and Financial Advisor**

**EA Enrolled Agent**

**LLC Limited Liability Corporation**

**LLP Limited Liability Partnership**

**MBA Master of Business Administration**

**NASD National Association of Securities Dealers**

**PC Professional Corporation**

**PFP Personal Financial Planner**

**PFS Personal Financial Specialist**

**RIA Registered Investment Advisor**