

PLACER SPCA

**Planned
Giving
Professionals
Directory**





Mark your calendar!

**2012 Planned Giving
Professionals Forum Dates**

Thursday, February 2, 2012

12:00 – 1:00 pm, Placer SPCA, Roseville

Thursday, May 3, 2012

7:30 – 8:30 am, Westlake, Grahl & Glover

Thursday, August 2, 2012

12:00 – 1:00 pm, Placer SPCA, Auburn

Thursday, November 8, 2012

5:30 to 7:00 pm, Location TBA

Planned Giving Professional Forums are intended to provide you updates on Placer SPCA programs and services benefitting the community, as well as gain your input on how we could enhance our communication, outreach and overall planned giving program.

For more information or to RSVP, please contact Susan Willson, Development Director, at (916) 782-7722 ext. 102 or (530) 885-7387 ext. 102 or e-mail susanw@placerspca.org

Attorneys



Therese A. Adams, Esq.

Estate Planning Attorney &

Private Fiduciary

Adams & Hayes Law

563 2nd Street, Ste 110

Lincoln, CA 95648

Ph: (916) 434-2550

adams@adamshayeslaw.com

www.adamshayeslaw.com

Education

Juris Doctorate, Lincoln Law School of Sacramento; Bachelor of Science degree in Business Administration, Masters degree in Business Administration from California Coast University, Associate of Risk Management (ARM) certification from the Insurance Institute of America.

Specialty

The attorneys and staff at Adams & Hayes Law are dedicated to assisting clients in Estate Planning, Succession Planning, Trust Administration, Probate, Conservatorships, and Elder Abuse cases. Ms. Adams is a member of the State Bar of California and the Estate Planning Section of the State Bar of California. She is also a member of the Bar Associations in Sacramento, Placer, Yuba, and Sutter counties, in addition to the Tahoe-Truckee Bar Association. Ms. Adams is a California Licensed Private Fiduciary, License # 284.

To schedule a meeting

Call my office at (916) 434-2550

The introductory session is complimentary.

Attorneys



Lynn A. Dean, Attorney at Law

Estate Planning Attorney

Law Office of Lynn A. Dean

1410 Rocky Ridge Road, Ste. 340

Roseville, CA 95661

Ph: (916) 786-7515

lynn@lynndeanlaw.com

www.lynndeanlaw.com

Education

McGeorge School of Law; BA, California State University
Sacramento

Specialty

Specializing in Estate Planning, Elder Law, Estate Administration and Conservatorship allows us to cover all the needs that arise for our clients with respect to changes in their lives, and planning for a smooth transition to their heirs. We pride ourselves in providing clients with focused attention to meet their personal needs, while protecting their financial interests.

To schedule a meeting

Call (916) 786-7515

The introductory session is complimentary.

Attorneys



Guy Gibson

Estate Planning Attorney

Gibson & Gibson, A Law Corporation

100 Estates Drive
Roseville, CA 95678
Ph: (916) 782-4402

gibsonlaw@surewest.net

www.gibsonandgibsonestateplanning.com

Education

University of Pacific, McGeorge School of Law, Member of Trayner Honor Society; BA, UC Davis

Specialty

-Certified specialist in Probate and Estate Planning and Trust Law by the State Bar Association since 1992. Specialties include:

- Probate
- Wills
- Trusts
- Conservatorships
- Durable Powers of Attorney

To schedule a meeting

Contact my office between 8:30 am and 5:00 pm

Monday through Friday at (916) 782-4402

Attorneys



Jackie Marie Howard

Estate Planning Attorney

Jackie Marie Howard, Attorney at Law

210 Estates Drive, Ste. 202
Roseville, CA 95678
Ph: (916) 773-7373

howardlaw@pacbell.net
www.jackiemariehowardlaw.com

Education

Juris Doctorate, McGeorge School of Law; BA, California State University Sacramento

Specialty

- Estate Planning
- Powers of Attorney
- Trust Administration
- Advanced Health Care Directives
- Trusts
- Conservatorships
- Trust Reviews & Amendments
- Wills
- Probate

To schedule a meeting

Contact my office at (916) 773-7373 or
e-mail howardlaw@pacbell.net

The introductory session is complimentary.

Attorneys



John Palley

Estate Planning Attorney

Meissner, Joseph & Palley Inc.

2200B Douglas Blvd., Ste. 150
Roseville, CA 95661
Ph: (916) 920-5983

palleyj@lawofficeinc.com
www.lawofficeinc.com

Education

Juris Doctorate, McGeorge School of Law

Specialty

Certified Specialist in trust, probate and estate planning by the State Bar of California Board of Legal Specialization.

To schedule a meeting

Call my office Monday through Friday between 8am and 5 pm
at (916) 920-5983

The introductory session is complimentary.

Attorneys



Cecilia Tsang, Attorney at Law

Estate Planning Attorney

Family Wealth Law Group

3604 Fair Oaks Blvd. Ste 160 info@familywealthlawgroup.com
Sacramento, CA 95864 www.familywealthlawgroup.com
Ph: (800) 818-3954

Education

Juris Doctorate, University of California, Davis School of Law;
BA, Political Science, University of California Davis

Specialty

Estate Planning and Estate Settlement including personally drafting legal documents such as Trusts, Wills, Powers of Attorney and representation in Probate, Trust Administration, and Conservatorships. Experience in drafting instructions for the care of animals, Pet Trusts. Traditional Attorney Services and Do-It-Yourself estate planning assistance available.

To schedule a meeting

Call (800) 818-3954

Complimentary consultations and willing to travel out of the office for appointments

Attorneys



Ernest H. Tuttle, IV

Attorney at Law

Law Office of Ernest H. Tuttle

735 Sunrise Ave., Ste. 208
Roseville, CA 95661
(916) 782-6695

etuttle@ernesttuttlelaw.com
www.ernesttuttlelaw.com

Education

Juris Doctorate, McGeorge School of Law; BA, Political Science,
University of Redlands

Specialty

- Estate Planning
- Trust Administration
- Wills
- Powers of Attorney
- Conservatorships
- Probate

Mr. Tuttle is a member of the Trusts and Estates section of the State Bar of California and a member of the Placer County Bar Association.

To schedule a meeting

Call my office at (916) 782-6695 between 8:30 am and 5:00 pm

Monday through Friday

The introductory session is complimentary.

Attorneys



David Wade

Estate Planning Attorney

Wade Law Offices

2261 Lava Ridge Court
Roseville, CA 95661
Ph: (916) 220-7147

david@wadelawcorp.com
www.wadelawcorp.com

Education

Juris Doctorate, University of Pacific, McGeorge School of Law;
BA, Brigham Young University

Specialty

- Estate Planning
- Trust Administration
- Probate
- Business Transactions

To schedule a meeting

Contact my office at (916) 220-7147 or e-mail

david@wadelawcorp.com

The introductory session is complimentary.

Attorneys



Colleen J. Watters

Estate Planning Attorney

Law Office of Lynn A. Dean

Bar #: 256027

1410 Rocky Ridge Road, Ste. 340
Roseville, CA 95661

colleen@lynndeanlaw.com

www.lynndeanlaw.com

Ph: (916) 786-7515

Education

Lincoln Law School, Sacramento

Specialty

Specializing in Estate Planning, Elder Law, Estate Administration and Conservatorship allows us to cover all the needs that arise for our clients with respect to changes in their lives, and planning for a smooth transition to their heirs. We pride ourselves in providing clients with focused attention to meet their personal needs, while protecting their financial interests.

To schedule a meeting

Call my office Monday through Thursday between 8:30 am and 5 pm and Friday between 9 am and 2 pm at (916) 786-7515

The introductory session is complimentary.

CPAs



Karen Peak

Certified Public Accountant

Karen Peak, CPA

3017 Douglas Blvd., Ste. 300 karen@karenpeakcpa.com
Roseville, CA 95661 www.karenpeakcpa.com
(916) 788-7278

Education

BS, Accounting, California State University, East Bay

Specialty

- Tax planning & preparation
- Small to mid sized business outsource finance officer
- Business financial statements and business support

To schedule a meeting

Call my office at (916) 788-7278

The introductory session is complimentary.

CPAs



John Urrutia

Certified Public Accountant

Mann, Urrutia & Nelson CPAs

2901 Douglas Blvd., Ste. 290
Roseville, CA 956661
Ph: (916) 724-3980

jru@muncpas.com
www.muncpas.com

Education

BS, Accounting, St. Mary's College of California

Specialty

- Tax and Consulting
- High Income Tax Planning
- Estate Tax and Consulting
- Coordinator between Clients and other Professionals
- Emphasis and Quarterly and Year End Planning

To schedule a meeting

Call my office for a one hour complimentary phone consultation
at (916) 724-3980

Financial Planners



Sheila Cardno, MBA

Wealth Advisor

Spectrum Wealth Management/LPL

CA Insurance #0C42929

5925 Granite Lake Drive, Suite 130

Granite Bay, CA 95746

Ph: (916) 797-2244

sheila.cardno@lpl.com

www.spectrumwealthinc.com

Education

MBA, University of California, Berkeley; MEd., University of Oregon

Specialty

- Retirement planning with a income strategies
- Portfolio management with tax integration
- Estate planning and wealth transfer
- Charitable giving strategies

To schedule a meeting

Contact my office at 916-797-2244

The introductory session is complimentary.

Financial Planners



Jennifer Crisologo

Financial Advisor

The Principal Financial Group

CA Insurance #0E74194

915 Highland Pointe Drive, Ste. 250

Roseville, CA 95678

Crisologo.Jennifer@princor.com

Office: (916) 724-5287

www.jennifercrisologo.com

Cell: (916) 220-7107

Education

BA, Business/Economics, California State University Sacramento

Specialty

Comprehensive financial planning for families and small business owners. Specialties include:

- Retirement planning
- Group retirement & benefits
- Business succession planning
- Charitable giving strategies

To schedule a meeting

Contact my office between 8:30 am and 5:30 pm.

The introductory session is complimentary.

Financial Planners



Nic Delyon

Financial Planner

Delyon Wealth Management -

Wells Fargo Advisors FiNet

Ins #: 0H48230

6801 Five Star Blvd. #A
Rocklin, CA 95677
(916) 624-2000

n.delyon@delyonwm.com
www.delyonwm.com

Education

BS, Finance, University of San Francisco

Specialty

- Investments
- Risk Analysis
- Wholistic Financial Planning
- Retirement Income Planning
- Cash Flow Management

To schedule a meeting

Call my office at (916) 624-2000 for a no obligation financial household analysis.

The introductory session is complimentary.

Financial Planners



Colin Grahl, CFP®

Private Wealth Advisor

Westlake, Grahl & Glover/Ameriprise

Certified Financial Planner

CA Insurance #0730404

9265 Sierra College Blvd.

Granite Bay, CA 95746

Office: 916-677-1640

Colin.S.Grahl@ampf.com

www.wggadvisorgroup.com

www.colingrahl.com

Education

BBA, Accounting/Business Management, Northwood University

Specialty

Comprehensive financial planning for families and small business owners. Specialties include:

- Retirement planning
- Investment management
- Tax and estate planning
- Charitable giving strategies
- Asset ownership and beneficiary designation

To schedule a meeting

Contact my office between 8:30 am and 5:30 pm to schedule a phone conference or office visit. *The introductory session is complimentary.*

Financial Planners



Gerald Harshberger

Financial Planner

Perennial Pension & Wealth

Ins #: 0817114

2281 Lava Ridge Court, Ste. 340 gharshberger@perennialpw.com
Roseville, CA 95661 www.perennialpw.com
(916) 543-7032

Education

Over 21 years in the financial services industry.

Specialty

Gerald specializes in the use of life insurance products for business succession planning, estate conservation, and income protection. Additionally he offers investment management and retirement planning services to his clients.

To schedule a meeting

Call my office at (916) 367-4866

The introductory session is complimentary.

Financial Planners



Fred Laurice, MBA

Financial Planner

Smith—Mottini Financial Advisors/

Financial Network

CA# 0193026

2520 Douglas Blvd., Ste. 110
Roseville, CA 95661
Ph: (916) 967-9500

flaurice@planwelllivewell.com
www.planwelllivewell.com

Education

Masters in Business Administration, Stanford University School of Business; AB in Business Administration, San Jose State University

Specialty

- Retirement Planning
- Wealth Transfer
- Charitable Giving Strategies
- Investment Management
- Estate Planning

To schedule a meeting

Call my office at (916) 967-9500

The introductory session is complimentary.

Financial Planners



Monika Reyes, CFS

Financial Planner

Westlake, Grahl & Glover

Ins #: 0E14509

9265 Sierra College Blvd.
Granite Bay, CA 95746
916-677-1640

monika.l.reyes@ampf.com
www.wggadvisorgroup.com

Education

BS, Business Administration, Sonoma State University

FINRA Series 7, Series 63, Series 66

Specialty

As an Ameriprise financial advisor, I believe success should be measured not just by your financial well-being, but by how confident you feel about your future. My areas of focus include:

- Retirement Planning Strategies
- Estate Planning Strategies
- Saving for Education

To schedule a meeting

Call my office at (916) 677-1640 or

e-mail me at monika.l.reyes@ampf.com

The introductory session is complimentary.

Financial Planners



E. Howard Rudd

Financial Planner

President & CEO

Integral Financial Management

Ins #: 0846488

2390 Professional Drive
Roseville, CA 95661
(916) 773-9330

howard@ehrudd.com
www.ehrudd.com

Education

BS, Organizational Behavior, University of San Francisco

Professional Designations: RIA 927-0417 ATP A008157

Specialty

Personal financial planning for individuals and small businesses, including:

- Practical estate planning
- Charitable giving strategies
- Retirement planning
- Investment management
- Tax planning for high income individuals

To schedule a meeting

Call my office at (916) 773-9330

The introductory session is complimentary.



Join Us... Placer SPCA Pet Trust Workshop

Pet Trusts:

Providing for our Furry Family Members

Pet Trusts may be appropriate for any size estate. The purpose of a pet trust is to ensure that should the pet parent pass away or become disabled, the pet will still be cared for properly.

Placer SPCA's Pet Trust Workshops are presented by a licensed attorney specializing in estate planning. Two free workshops are scheduled for 2012 – May 10th and November 15th – reservations are required. Please call the number below for specifics.



Topics Will Include

- Who should care for my pets as a trustee, and should that person be compensated?
- How much do I need to set aside?
- What happens to the trust after my pet's lifetime?

This workshop is for educational purposes only. You will not be solicited to purchase services and your contact information will not be shared.

Questions?

Please contact Susan Willson, Development Director, at the contact information listed below.



916.782.7722/530.885.7387, ext. 102 funddevelopment@placerspca.org

Placer County's Companion Animal Welfare Experts – Where Your Donations Stay Local

Companion Animal Care Center
150 Corporation Yard Road, Roseville, CA 95678
916.782.7722/530.885.7387 Fax: 916.782.8655

NOW OPEN: Pet Adoption & Resource Center
1482 Grass Valley Highway, Auburn, CA 95603
530.823.7722

www.placerspca.org

The Placer SPCA is a private, nonprofit organization not affiliated with any other entity.
We do not receive donations through the ASPCA or HSCUS.

We also offer free estate planning workshops throughout the year. Please contact our Development Office if you are interested in learning how charitable planned giving can help you realize your personal goals, as well as help your favorite charity.

Enhancing the future of the Placer SPCA.



Legacy Society Members

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

Member Benefits Include:

- ♥ Gift of appreciation
- ♥ Recognition in the Placer SPCA newsletter and website
- ♥ Special invitation to annual CEO Forum
- ♥ Invitations to donor gatherings
- ♥ Listing in major event programs

Members of the *Circle of Hope Legacy Society* have included Placer SPCA in their will, trust, or estate, and have notified us of their intentions.

Listed with permission:

The Smith Family Trust/Robert G. and Claudia K. Smith

Marilyn Kennedy

LeeAnn & Lonnie Dickson

Bill & Nancie Radakovitz

Patricia M. Anderson

Mary & Dave Terrell

Charlene Michelson

Jack & Gale Wright

Marlene Stoner

Jacqueline Haeling-Groff

Leilani Vierra

Colleen Watters

Colin & Karen Grahl

Michael & Lyn Hutch

Pamela T. Franklin

Anne Hauber

Kent & Jeannette Liebman

Kimberly Silvers & Sheila Cardno

The Placer SPCA Planned Giving Professionals Directory is intended to serve only as a resource for Placer SPCA friends and supporters interested in learning about planned giving and charitable giving strategies. The directory is comprised of professionals who have regularly attended planned giving workshops and/or forums hosted by the Placer SPCA and are familiar with our organization, mission and services. *This directory is in no way intended to be a referral to one specific agency and/or professional.*

If you are interested in learning more about the Placer SPCA planned giving program or joining our Circle of Hope Legacy Society, please contact our Development Office at:

(916) 782-7722 ext. 102

(530) 885-7387 ext. 102

funddevelopment@placerspca.org



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150 Corporation Yard Road
Roseville, CA 95678
916.782.7722/530.885.7387

Pet Adoption & Resource Center
1482 Grass Valley Hwy.
Auburn, CA 95603
530.823-7722

www.placerspca.org

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