HONORHEALTH

Foundation

Financial Health Advisory Council

February 2019

Deborah M. Adams, CPA

Partner
Adams, Kvittem-Barr & Assoc. CPAs, LLP
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Areas of Concentration:

Accounting and tax, financial planning, business development, business strategic planning

Education and Training:

B.S., Auburn University; MBA, Georgia State University; Cert. of Advanced Graduate Study, Pace University; CPA

Professional and Civic Activities:

American Institute of Certified Public Accountants; Arizona Society of Certified Public Accountants; Scottsdale Chamber of Commerce; Carefree/Cave Creek Chamber of Commerce; Past Arizona Chair, National Small Business Advisory Council; Foothills Caring Corp; Ronald Reagan Presidential Foundation Advisory Council

Susan S. Brousseau CLU, ChFC, CFP®

Senior Vice President
Wealth Advisor
Blackhawk Capital Partners
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Areas of Concentration:

Investment advisory services, comprehensive financial analysis including implementation of estate planning, investment planning, retirement planning

Education and Training:

College of Charleston, Medical Technology

Professional and Civic Activities:

Central Arizona Estate Planning Council; Society of Financial Services Professionals; Financial Planning Association; Pinnacle Presbyterian Church Finance Committee; Pinnacle Presbyterian Church Chancel Choir; PEO

Andrea L. Claus

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Areas of Concentration:

Estate planning, probate and trust administration

Education and Training:

BA, Arizona State University; JD, Arizona Summit Law School

Professional and Civic Activities:

Board of Directors, UMOM; Professional Advisor's Council, Southwest Autism Research & Resource Center; Arizona Women's Lawyer Association; Maricopa County Bar Association's Estate Planning, Probate & Trust Section

Teresa Coin

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Areas of Concentration:

Trust and estate administration, estate planning, fiduciary taxation

Education and Training:

B.A., University of New Mexico; JD, Wake Forest University School of Law; LL.M., University of Miami School of Law

Professional and Civic Activities:

Financial Health Advisory Council, HonorHealth Foundation

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Brett Gaboury

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Areas of Concentration:
Auto, home and personal liability insurance; life insurance; disability insurance

Education and Training:
BS, Arizona State University, W.P. Carey School of Business

Professional and Civic Activities:
Board Member, NAIFA Phoenix Chapter

Kenneth R. Hartley, CFA

Portfolio Manager/Investment Advisor
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Areas of Concentration:
Wealth Management

Education and Training:
BBA, MBA, Western Michigan University

Professional and Civic Activities:
CFA Institute; Chairman, HonorHealth Charity Golf Classic Committee

L. Jane Heist

Certified Public Accountant
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Areas of Concentration:
Portfolio management, tax planning and compliance, estate planning and compliance, investment planning

Education and Training:
B.S. Accounting, University of Northern Colorado

Professional and Civic Activities:
American Institute of CPAs; Arizona and Colorado Societies of CPAs; Phoenix CFA Society; CFA Institute; East Valley Estate Planning Council; Western Pension & Benefit Conference

Charles J. Inderieden

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Areas of Concentration:
Individual, estate, gift and trust tax planning and compliance

Education and Training:
B.S. Accounting, Arizona State University

Professional and Civic Activities:
American Institute of CPAs; Arizona Society of CPAs; Central Arizona Estate Planning Council; Scottsdale Estate Planners Study Group; Life Member of EC70, Phoenix Metropolitan Boys & Girls Club; Arizona State University Professional Advisory Committee for the School of Accountancy

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Richard B. Johnson

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Areas of Concentration:
Investment planning, retirement planning, complex asset allocation strategies, annual budgeting, single-stock strategies, philanthropic gifting, multi-generational financial planning

Education and Training:
B.S. Aerospace Engineering, UCLA

Professional and Civic Activities:
Central Arizona Estate Planning Council

James R. Lukes

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Areas of Concentration:
Planned giving, trusts/estates, conservatorships, guardianships

Education and Training:
Arizona State University; Fresno City College

Professional and Civic Activities:
Central Arizona Estate Planning Council; East Valley Estate Planning Council; Phoenix Zoo Advisory Board; Area Agency on Aging; Planned Giving Roundtable

Barry A. McBride

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Areas of Concentration:
Estate planning, non-qualified retirement plans

Education and Training:
B.A., Grand Canyon University

Professional and Civic Activities:
Society of Financial Service Professionals; Million Dollar Round Table Foundation; School Board, Canyon State Academy.

Past Arizona President, National Association of Insurance and Financial Advisors; Past President, Central Arizona Estate Planning Council; Past President, Fellowship of Christian Athletes State Board; Past Board Chair, St. Mary's Food Bank Alliance

Denise McClain

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Areas of Concentration:
Wealth management, estate planning, trust and estate administration, financial planning

Education and Training:
B.S., Accountancy, Arizona State University; J.D., Arizona State University College of Law

Professional and Civic Activities:
Past President and Board Member, Susan G. Komen for the Cure Phoenix Affiliate; Steering Committee and Volunteer, Wills for Heroes; Valley Estate Planners; Scottsdale Estate Planners; Phoenix Business Journal Class of 2009 "Forty Under 40"; Crittenton Society Leadership Council, Florence Crittenton; Planned Giving Advisory Committee, Phoenix Zoo

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Areas of Concentration:
Estate planning, probate, trust and estate administration, guardianships and conservatorships for adults

Education and Training:
J.D., University of Kansas School of Law; B.B.A., Washburn University

Professional and Civic Activities:
Arizona Endowment Building Initiative; Central Arizona Estate Planning Council; Planned Giving Roundtable; Valley Estate Planners

Kari R. Meyrose

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Areas of Concentration:
Estate planning, probate, business law and real estate

Education and Training:
J.D., Loyola University Chicago; B.S., Arizona State University

Professional and Civic Activities:
Executive Council - Elder law, Mental Health and Special Needs Planning Section, State Bar of Arizona; Probate and Trust Section, State Bar of Arizona; National Alliance for the Mentally Ill

Harry A. Papp

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Areas of Concentration:
Portfolio and wealth management, general investment advice

Education and Training:
B.A., Brown University; M.B.A., University of Chicago; Chartered Financial Analyst

Professional and Civic Activities:
Member and Past President, Phoenix Zoo Board; Treasurer, Community Health Charities; Board Member, Blue Cross Blue Shield; Trustee, Arizona State University Foundation; Board of Directors, Arizona State Board of Investment

Nihaal M. Rao

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Areas of Concentration:
Retirement planning; investment planning

Education and Training:
Bachelor's degree-Economics, University of Arizona; Masters degree-Business Administration, Benedictine University; Masters degree-Science & Financial Services, American College

Professional and Civic Activities:
Advisory Board, St. Vincent de Paul; Counselor, Boy Scouts of America; Girl Scouts of America

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Ali N. Rizvi

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Areas of Concentration:

Wealth accumulation; preservation and succession strategies

Education and Training:

B.S., University of Arizona

Professional and Civic Activities:

Financial Advisory Council, Mountain Park Health Centre Foundation; National Association of Insurance and Financial Advisors; Million Dollar Round Table (MDRT); Planned Giving Committee Chairman, Phoenix Children's Hospital Foundation; Phoenix Committee on Foreign Relations

Ron Saffer, CLU

Fiduciary Wealth Manager

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Registered Principal
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Areas of Concentration:

Fiduciary fee-based wealth management, a Registered Investment Advisory (RIA) firm

Education and Training:

Finance and Accounting, University of Arizona; CLU, American College Bryn Mawr, PA

Professional and Civic Activities:

Past President/Member, Hall of Fame-SFSP; Financial Planning Association; Past President/Member, Central Arizona Estate Planning Council; Trustee Emeritus, Foundation Trustee, Life Board of Directors, Phoenix Boys & Girls Club; Advisor to Legacy Committee, Mountain View Presbyterian Church; Chairman of Investment Committee, Valley Presbyterian Church Foundation; Past Chairman & Board of Directors, Junior Golf Assoc. of AZ

Abbie Shindler

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Areas of Concentration:

Estate planning, Corporate, Probate/Trust Administration, Guardianships/Conservatorships

Education and Training:

J.D., California Western School of Law

Professional and Civic Activities:

Beach Ball Committee, Phoenix Children's Hospital; Professional Advisory Committee and Tax & Legal Seminar Planning Committee, Arizona Community Foundation; Current Tax Discussion Group; Junior League of Phoenix

Emory J. Smith

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Areas of Concentration:

Estate planning, retirement planning for professionals, business succession planning

Education and Training:

B.S. in Management, Arizona State University

Professional and Civic Activities:

President-Elect, National Association of Insurance Advisors-Phoenix; Board member, Central Arizona Estate Planning Council; Student mentor, WP Carey School of Business; Valley Partnership; Urban Land Institute; Make-A-Wish Arizona

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Christine Spitzer

AVP/Trust Officer
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Areas of Concentration:

Estates, irrevocable trusts, revocable trusts, IRAs, investment management accounts

Education and Training:

AA, Orange Coast College; Cannon Trust School; Western International University

Professional and Civic Activities:

Treasurer, Valley Estate Planners

Mitchell J. Stillman

Managing Director, Investments
Portfolio Manager
Wells Fargo Advisors

Education and Training:

B.A., University of Cincinnati

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services LLC, Member FINRA/SIPC

Laura M. Stover

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Areas of Concentration:

Estate planning; probate and trust administration

Education and Training:

BS-Political Science, Arizona State University; JD, Golden Gate University School of Law

Professional and Civic Activities:

Central Arizona Estate Planning Council; Maricopa County Bar Association; Arizona State Bar Association; American Bar Association; Investment Committee, ASU Women and Philanthropy; Valley Youth Theatre

Lisa L. Sullivan

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Areas of Concentration:

Trust and estate administration, estate planning, investment management, financial planning

Education and Training:

Business Administration, Rio Salado Community College; Cannon Trust School

Professional and Civic Activities:

Central Arizona Estate Planning Council; Arizona Fiduciaries Association; Past Co-Chair, Development Committee-Free Arts

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Areas of Concentration:

Finance and Outreach

Education and Training:

B.A., Point Loma University; M.F.A., St. Mary's College

Professional and Civic Activities:

Arizona Council of Economic Education (ACEE) Board

J. Darren Wallace

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Areas of Concentration:

Small business owners benefits, individual planning and legacy planning, group benefits and gap management

Education and Training:

B.S.-Business Marketing & Minor in Communications and Journalism, Oregon State University

Professional and Civic Activities:

Financial Industry Regulatory Authority (FINRA), Million Dollar Round Table (MDRT); Boy Scouts of America

Keith Wibel, CFA

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Areas of Concentration:

Fee-only investment management for individuals, businesses, retirement plans, endowments and foundations

Education and Training:

B.S.-Finance, Arizona State University; Graduate Study, University of Michigan Graduate School of Business; Chartered Financial Analyst, CFA Insitute

Professional and Civic Activities:

Advisor to Student Investment Management Fund, Arizona State University; Investment Committee, Northern Arizona University; Phoenix CFA Society; Scottsdale Estate Planners