

# Scottsdale Healthcare Foundation

## Financial Health Advisors

March 2013



### Deborah M. Adams

Partner  
**Adams, Kvittem-Barr & Assoc.  
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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; North Scottsdale Chamber of Commerce; Carefree Kiwanis; Past Arizona Chairman, National Small Business Advisory Council;; Treasurer, Republican Legislative District 15; Foothills Caring Corp



### Linda S. Batts

Attorney at Law  
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#### **Areas of Concentration:**

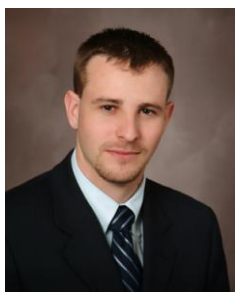
Estate planning, estate tax and trust administration

#### **Education and Training:**

J.D., University of Iowa; B.S., Iowa State University

#### **Professional and Civic Activities:**

State Bar of Arizona; Maricopa County Bar Association



### Corey M. Bird

Wealth Manager  
**Rowland Carmichael Advisors, Inc.**  
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#### **Areas of Concentration:**

Financial planning; insurance consulting; real estate investing; investment management

#### **Education and Training:**

B.A.-Finance, Central Washington University  
A.A., Wenatchee Valley College

#### **Professional and Civic Activities:**

Central Arizona Estate Planning Council; Financial Planning Association; Scottsdale Young Life Committee; Wounded Warrior Foundation



### Gail Bradley

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#### **Areas of Concentration:**

Foundation, business and not-for-profit consultation; retired Vice President, Northern Trust

#### **Education and Training:**

B.A., University of Arizona; Master of Counseling, Arizona State University; Securities licenses: Series 7 & 66

#### **Professional and Civic Activities:**

Desert Botanical Board; Scottsdale Public Art Board; Phoenix Committee on Foreign Relations Board; ASU Women in Philanthropy; Past Chairman, Scottsdale Cultural Council Board; Herberger Theater Center Board; Scottsdale Boys and Girls Club Board; Jewish Federation Foundation Professional Advisory Committee; Arizona Community Foundation Advisory Board; Arizona Women's Forum

# Scottsdale Healthcare Foundation

## Financial Health Advisors



### Susan S. Brousseau

Senior Vice President  
Wealth Advisor  
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#### *Areas of Concentration:*

Comprehensive financial analysis, including implementation of estate planning; investment planning; retirement planning; trust services

#### *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 Foundation; Pinnacle Presbyterian Church Chancel Choir



### Mary Budzien

Wealth Advisor I  
**USAA Wealth Management**  
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#### *Areas of Concentration:*

Estate planning, life insurance and investments

#### *Education and Training:*

MSN, Arizona State University, College of Nursing  
Certified Financial Planner

#### *Professional and Civic Activities:*

Past President, Central Arizona Estate Planning Council



### Teresa Coin

Vice President  
**Bank of Arizona, N.A.**  
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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:*

Valley Estate Planners; Planned Giving Round Table of Arizona; Paradise Valley Estate Planning Group



### Mary Collum

Senior Vice President  
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#### *Areas of Concentration:*

Commercial/private lending

#### *Education and Training:*

B.S.-Finance, Arizona State University; MBA, University of Phoenix; Graduate Level Banking Degree, Pacific Coast Banking School

#### *Professional and Civic Activities:*

Arizona Business Leadership; Valley Leadership Class 33; Social Venture Partners; Arizona Foundation for Women; Director, Central Phoenix Women

# Scottsdale Healthcare Foundation

## Financial Health Advisors



### Thomas W. Dietrich

Attorney at Law  
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#### *Areas of Concentration:*

Estate planning and probate; corporations, partnerships and limited liability companies; taxation; elder law

#### *Education and Training:*

BA, University of Texas; JD, University of Texas; Master of Taxation, University of Florida

#### *Professional and Civic Activities:*

Planned Giving Roundtable Board; National Academy of Elder Law Attorneys; Central Arizona Estate Planning Council; State Bar of Arizona



### Steven M. Fox

Attorney at Law, LLM in Taxation  
Shareholder  
**Buchalter Nemer**  
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#### *Areas of Concentration:*

Estate planning, income tax planning, estate and gift taxation, retirement planning, partnership and corporate taxation, business law and entity formations

#### *Education and Training:*

B.A. History, University of Richmond, Virginia; J.D.-Cum Laude, Touro Law Center in Huntington, New York; Master of Law-honors, Taxation, Golden Gate University School of Law, San Francisco

#### *Professional and Civic Activities:*

Board of Directors, Kids At Hope; State Bar of Arizona



### J. Noland Franz, Esq.

Attorney at Law  
Certified Estate & Trust Specialist  
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#### *Areas of Concentration:*

Estate planning; estate and trust litigation; probate and trust administration; securities litigation and arbitration; business law, including business exit planning; charitable giving, formation and representation of tax exempt organizations

#### *Education and Training:*

B.A., University of Kansas; J.D., University of Michigan; MBA, University of Missouri at Kansas City

#### *Professional and Civic Activities:*

State Bar of Arizona, Missouri Bar Association; WealthCounsel; Rotary Club of Scottsdale; Valley Leadership, Class V



### DeWitt C. Gibson III

Owner  
**The Gibson Agency**  
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602-953-7447  
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#### *Areas of Concentration:*

Personal life insurance, business life insurance, estate life insurance

#### *Education and Training:*

B.S., Arizona State University

#### *Professional and Civic Activities:*

Past Board Member, Paradise Valley Country Club; Past President, Phoenix Saguaro Kiwanis; Past Board Member, Phoenix 100 Club

# Scottsdale Healthcare Foundation

## *Financial Health Advisors*



### **John A. Gulick III, Esq.**

Attorney at Law/CPA  
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Scottsdale, Arizona 85266  
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#### ***Areas of Concentration:***

Taxation, estates & trusts; probate, wills, trusts and Probate Court master services; financial & philanthropic planning, wealth advisory & strategy; government relations, legislative affairs & public policy; political & election campaign consulting, communications; general counsel legal services & executive management, public & private companies

#### ***Education and Training:***

B.S., Business Administration, University of Arizona;  
J.D., Southern Methodist University

#### ***Professional and Civic Activities:***

Chairman, Scottsdale 2012 Bond Task Force; American Institute of CPAs; Arizona Society of CPAs; American Bar Association; Texas Bar Association; Scottsdale Bar Association; President, LMVHOA



### **Stephen Hatcher**

First Vice President, Investments  
Senior PIM Portfolio Manager, RIA  
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#### ***Areas of Concentration:***

Investment and estate planning

#### ***Education and Training:***

BSME-Aerospace Engineering, Arizona State University;  
MBA-Finance, University of Phoenix

#### ***Professional and Civic Activities:***



### **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



### **Robert W. Hollinger**

First Vice President  
**Merrill Lynch Private Client Services**  
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#### ***Areas of Concentration:***

Portfolio management, wealth management advisory, financial planning

#### ***Education and Training:***

BSB, Emporia State University-Kansas; Certified Financial Planner

#### ***Professional and Civic Activities:***

Past Foundation Board, St. Barnabas on the Desert; Past Officer, The Wildest Club in Town, Phoenix Zoo



# Scottsdale Healthcare Foundation

## Financial Health Advisors



### Charles J. Inderieden

Certified Public Accountant  
**Henry & Horne, LLP**  
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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; Executive Council Life Member, Phoenix Metropolitan Boys & Girls Club; Member, Arizona State University Professional Advisory Committee for the School of Accountancy; Chairman, Scottsdale Healthcare Foundation Financial Health Advisors; Board Member, Arizona Musicfest



### Robert L. Jackson

Chief Executive Officer  
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#### *Areas of Concentration:*

Investment advisors, financial planning, estate and wealth management, retirement planning

#### *Education and Training:*

B.S. Finance, Arizona State University; Certified Financial Planning Professional

#### *Professional and Civic Activities:*

The Financial Planning Association; Secretary, Scottsdale Rotary Club; Treasurer, Scottsdale Rotary Foundation; Scottsdale Chamber of Commerce; Past President, Scottsdale Ranch Community Association



### Richard B. Johnson

Principal  
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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



### Christopher J. Klecka

Director  
**Citi Private Bank**  
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#### *Areas of Concentration:*

Wealth management advisory, financial planning, estate and trust administration

#### *Education and Training:*

B.S. Finance and Accounting, University of Arizona

#### *Professional and Civic Activities:*

Hon Kachina Council; Planned Giving Advisory Council, TGen; CPA Volunteer, Valley of the Sun United Way

# Scottsdale Healthcare Foundation

## Financial Health Advisors



### Jess D. Kravitz

Managing Partner  
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480-659-3850  
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#### *Areas of Concentration:*

Retirement and wealth management

#### *Education and Training:*

BS Accounting, Quinnipiac College; CFP, College of Financial Planning

#### *Professional and Civic Activities:*

Scottsdale Healthcare Foundation: Scottsdale Healthcare Golf Classic Committee; Chairman, Virginia G. Piper Cancer Center Gift of Life Lodging Program



### Gregory M. Kruzel

Attorney at Law  
**Braun Siler Kruzel PC**  
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#### *Areas of Concentration:*

Estate planning, estate administration, contested estates and closely-held business disputes, charitable planning, business planning, mergers and acquisitions

#### *Education and Training:*

B.A., St. Mary's University of Minnesota; J.D., University of Notre Dame

#### *Professional and Civic Activities:*

Board of Directors, Central Arizona Estate Planning Council; Board of Directors, Phoenix Children's Hospital Foundation; Board of Directors, McDowell Sonoran Conservancy; Professional Advisory Board, Catholic Community Foundation; Past Chair, Professional Advisory Board, Arizona Community Foundation; Past President, Xavier Foundation, Inc.



### W. John Lischer

Attorney at Law  
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#### *Areas of Concentration:*

Estate planning, trust administration

#### *Education and Training:*

B.A., Grinnell College; J.D., University of Michigan

#### *Professional and Civic Activities:*

Board Member, Sun Valley Lodge; Board member, Ellis Center for Educational Excellence



### Roman Lopatynski

Investment Advisor Representative  
**ING Financial Partners**  
10845 N. 95<sup>th</sup> Place  
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#### *Areas of Concentration:*

Fee-based investment management

#### *Education and Training:*

BSEE, University of Illinois

#### *Professional and Civic Activities:*

# Scottsdale Healthcare Foundation

## Financial Health Advisors



**James R. Lukes**

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602-320-3467  
Email: [Ljlukes@cox.net](mailto:Ljlukes@cox.net)

**Areas of Concentration:**

Planned giving

**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**

Life Insurance Agent  
**The Sun Cornerstone Group, Inc.**  
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Scottsdale, Arizona 85258  
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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 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



**Michael K. McCartney**

Senior Vice President  
Manager, Wealth Management Group  
**Arizona Bank & Trust**  
2036 E. Camelback Road  
Phoenix, Arizona 85016  
602-381-2065  
Email: [mmccartney@arizbank.com](mailto:mmccartney@arizbank.com)

**Areas of Concentration:**

Wealth management

**Education and Training:**

B.S., M.B.A., Arizona State University

**Professional and Civic Activities:**

Past Chairman and Treasurer, Gompers Habilitation Center; Member and Past President, Central Arizona Estate Planning Council; Catholic Community Foundation, Finance and Investment Committee



**Denise McClain**

Financial Principal  
**Abbot Downing**  
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**Areas of Concentration:**

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, Susan G. Komen for the Cure Phoenix Affiliate; Planned Giving Advisory Council, Ballet Arizona; Steering Committee and Volunteer, Wills for Heroes; Valley Estate Planners; Scottsdale Young Estate Planners; Phoenix Business Journal Class of 2009 "Forty Under 40"; Crittenton Society Leadership Council, Florence Crittenton; Planned Giving Advisory Committee, Phoenix Zoo

# Scottsdale Healthcare Foundation

## *Financial Health Advisors*



### **T. Troy McNemar**

Certified Specialist in Estate & Trust Law  
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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; Rotary 100



### **Kari R. Meyrose**

Attorney at Law  
**Titus Brueckner & Levine PLC**  
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#### ***Areas of Concentration:***

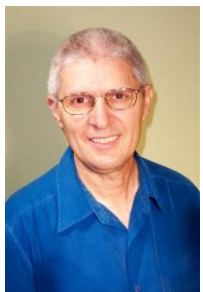
Estate planning, business law and real estate

#### ***Education and Training:***

J.D., Loyola University Chicago; B.S., Arizona State University

#### ***Professional and Civic Activities:***

National Alliance for the Mentally Ill; Wills for Heroes; Scottsdale Bar Association



### **Mark Moritz**

Attorney at Law  
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#### ***Areas of Concentration:***

Estate planning to clients' individualized, personalized specifications

#### ***Education and Training:***

B.S., University of Phoenix; J.D., Arizona State University

#### ***Professional and Civic Activities:***

Planned Giving Round Table; National Council on Planned Giving; Valley Estate Planners; Society of Financial Service Professionals; Probate/Trust Section, Maricopa County Bar Association; Arizona Bar Association



### **Karen L. Nagle**

President  
**Nagle Law Group, P.C.**  
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#### ***Areas of Concentration:***

Estate planning

#### ***Education and Training:***

B.A., Brandeis University; J.D., University of Southern California

#### ***Professional and Civic Activities:***

Women's Philanthropy Board, Jewish Community Association; Central Arizona Estate Planning Council; Phoenix Girls' Chorus; Maricopa County Foster Care Review Board; Har Zion Congregation; Kivel Campus of Care; Kivel Campus of Care Auxiliary



# Scottsdale Healthcare Foundation

## Financial Health Advisors



### Harry A. Papp

Investment Advisor  
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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



### Edward L. Plotkin

Vice President/Wealth Manager  
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Wealth Management**  
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#### *Areas of Concentration:*

Wealth management; financial planning; trust and estate administration; investment management for affluent families, corporate executives, business owners and foundations

#### *Education and Training:*

B.A. Economics, University of Arizona

#### *Professional and Civic Activities:*

Founding Member, Arizona Chapter of the National Association of Corporate Directors; Board Member, Friends of Public Radio Arizona; President, Mustang Lacrosse Club



### Paul R. Quackenbush, CTFA

Elder Services Specialist  
**Wells Fargo Private Bank**  
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602-326-9220

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#### *Areas of Concentration:*

Elder Services – life and wealth management solutions for aging adults

#### *Education and Training:*

BS-Accounting, Arizona State University; Certified Public Accountant, State of Arizona; Certified Trust Financial Advisor

#### *Professional and Civic Activities:*

Board of Directors, ElderFriends/DOVES; Planned Giving Committee, Sun Health Foundation; Memory Training Volunteer, Banner Alzheimer's Institute



### Ali N. Rizvi

Partner  
**North Star Resource Group**  
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602-224-5366  
Email: [ali.rizvi@northstarfinancial.com](mailto:ali.rizvi@northstarfinancial.com)

#### *Areas of Concentration:*

Retirement planning, tax planning/estate planning, investment planning

#### *Education and Training:*

B.S., University of Arizona

#### *Professional and Civic Activities:*

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

# Scottsdale Healthcare Foundation

## Financial Health Advisors



### Jean Reed Roberts

Retired Attorney  
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#### **Areas of Concentration:**

Estate planning, probate – retired

#### **Education and Training:**

B.A. Journalism, University of North Carolina; J.D., Arizona State University

#### **Professional and Civic Activities:**

Charter 100 of Phoenix, American Association of University Women



### Ron Saffer, CLU

Investment Advisor Representative  
Registered Principal FINRA  
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#### **Areas of Concentration:**

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:**

NAIFA; Member of Hall of Fame and Past President, Society of Financial Service Professionals; Central Arizona Estate Planning Council and Past President; Trustee Emeritus, Foundation Trustees and Board of Directors Life, Phoenix Boys & Girls Club; Past Board, Junior Golf Association of AZ; Past Foundation Investment Committee, Valley Presbyterian Church



### Scott R. Santerre

Attorney at Law  
Certified Tax Specialist  
**Santerre & Vande Krol, Ltd.**  
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Email: [srs@svklaw.com](mailto:srs@svklaw.com)

#### **Areas of Concentration:**

Estate and tax planning, probate and trust law, qualified retirement plans

#### **Education and Training:**

B.S. with distinction, Business Administration, Arizona State University; J.D., cum laude, University of San Diego

#### **Professional and Civic Activities:**

Arizona and U.S. District Court; District of Arizona; U.S. Tax Court; State Bar of Arizona; Maricopa County Bar Association; Scottsdale Bar Association; Member, 401 Committee; Phoenix Tax Workshop; Tax Law Certified Specialist, Arizona Board of Legal Specialization



### Frederick A. Schertenlieb

Vice President,  
Wealth Management Group  
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#### **Areas of Concentration:**

Trust and estate planning, fee-based investment management, private banking (lending), personal banking/deposit products

#### **Education and Training:**

BBA, Western Michigan University; MBA, Northwestern University

#### **Professional and Civic Activities:**

Central Arizona Estate Planning Council; Canada Arizona Business Council; Investment Management Committee, Phoenix Area Agency on Aging; Planned Giving Development Committee, Phoenix Zoo

# Scottsdale Healthcare Foundation

## Financial Health Advisors



### Daniel T. Schmaltz

Partner, Southwest Region  
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#### *Areas of Concentration:*

Family business succession, wealth governance, sophisticated life insurance solutions

#### *Education and Training:*

B.S.-Finance, Arizona State University

#### *Professional and Civic Activities:*

Board of Directors, St. Mary's High School Scholarship and Benefit Fund; Central Phoenix Young Life Committee; Dads on Duty, Lookout Mountain Elementary School; W.P. Carey School of Business Alumni Association, Arizona State University



### Philip M. Seibel

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#### *Areas of Concentration:*

Life insurance

#### *Education and Training:*

Corporate Communications, University of Texas

#### *Professional and Civic Activities:*

President, People Invested in People; Arizona Baseball Charities



### Jay R. Spector

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#### *Areas of Concentration:*

Retirement, investment and estate planning for high net worth investors; implementation of customized business retirement solutions; generational wealth transfer through the utilization of life insurance solutions

#### *Education and Training:*

BGS-Business Administration, Northern Arizona University;  
Master of Science in real estate, Johns Hopkins University

#### *Professional and Civic Activities:*

Chair, Alpha Epsilon Pi Fraternity – Arizona Alumni Club;  
Scottsdale Leadership, Class XX; Fiesta Bowl Committee



### Christine Spitzer

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#### *Areas of Concentration:*

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; Tax and Legal Seminar Planning Committee, Arizona Community Foundation; Walk to Defeat ALS Planning Committee, The ALS Association

# Scottsdale Healthcare Foundation

## Financial Health Advisors



### **Mitchell J. Stillman**

Managing Director, Investments  
Portfolio Manager  
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#### ***Areas of Concentration:***

Portfolio management and asset allocation services for retirement plans and high net worth investors, with particular attention to tax ramifications

#### ***Education and Training:***

B.A., University of Cincinnati

#### ***Professional and Civic Activities:***



### **Robert E. Thomson**

Attorney at Law  
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#### ***Areas of Concentration:***

Estate planning and wealth preservation

#### ***Education and Training:***

B.A., Occidental College; J.D., University of California Berkeley

#### ***Professional and Civic Activities:***

Estate Trust and Probate Section, State Bar of Arizona; Trust and Probate Section, Maricopa County Bar Association; Scottsdale Bar Association; Board of Directors, Fountain Hills Sanitary District; Fountain Hills Senior Services Foundation Board; River of Time Museum Foundation



### **J. Darren Wallace**

Principal  
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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; Child Help



### **Keith Wibel**

President  
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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 Institute

#### ***Professional and Civic Activities:***

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

# Scottsdale Healthcare Foundation

## *Financial Health Advisors*



### **Ronald G. Wilson**

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#### ***Areas of Concentration:***

Estate planning

#### ***Education and Training:***

Undergraduate Degree, Emporia State University;  
J.D., Washburn University

#### ***Professional and Civic Activities:***

Past Chairman, Terraces of Phoenix Retirement Community;  
Past Chairman, Arizona State Bar Probate Section; Past  
Chairman, Central Arizona Estate Planning Council; Past  
Chairman, Central Arizona Chapter of the Arthritis Foundation;  
Planned Giving Committee, Phoenix Art Museum; First United  
Methodist Church; Valley of the Sun YMCA; KAET T.V.



### **L. Jeannette Wright**

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#### ***Areas of Concentration:***

Estate and trust planning, administration of trusts/estates,  
investment management

#### ***Education and Training:***

B.S. Accounting, Arizona State University

#### ***Professional and Civic Activities:***

Arizona Society of CPAs; Board Member, The Terraces of  
Phoenix; Past President, Central Arizona Estate Planning  
Council; Past President, Valley of the Sun Kiwanis