



DIRECTORY OF ESTATE PLANNING
Professional Service Providers

2014

250 D Street, Suite 205 • Santa Rosa, CA 95404-4773
Tel: 707.579.4073 Fax: 707.579.4801 • 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	Johnson, James D.	6
Allen, Carl	1	Kelley, Deberah B.	10
Angell, Diana	10	Kelm, Bruce A.	7
Archer, Kathleen	11	Ketron, Bruce D.	2
Bailey, Frank R.	1	King, Alice C.	7
Bernard, Bob	4	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	Lampson, Linda	4
Burger, Richard A.	1	Larsen, Michael	2
Burille, Linda	10	Lawrence, MaryClare	2
Byrnes, Anthony J.	10	Long, Gary R.	7
Callahan, Caren	1	Maize, Robert K.	2
Carlsen, Phillip D.	5	Marois, Kim	3
Cinquini, George H.	11	McGowan, Rita	7
Clarke, Gregg	5	Metz, Naomi E.	3
Cleland, Heather	5	Meyers, Lillian M.	7
Cobert, Nathan	5	Meyn, John P.	9
Corlett, Deborah G.	1	Neunzig, Brian	7
Coston, Bruce	5	Norton, Teresa J.	3
Croft, Thomas R.	5	O'Brien, John R.	3
Crouch, Jeffrey A.	5	Perlman, Alice L.	3
Davis, Ann M.	1	Pistole, Valerie	3
de la Forest, Charles	1	Radu, Mary	11
DeMartini, James F.	1	Rapoport, David S	10
Diepenbrock, Michael P.	1	Rondon, Brian D.	3
Dolinsek, John	9	Root Jr., Charles J.	7
Dreyer, Jeffrey M.	4	Rothenberg, Irwin S.	7
Drummond, Daniel A.	1	Rubins, Harry	7
Dzieza, Bruce	6	Sabuco, Valentino	7
Elliott, Margaret	1	Sanford, Alice	8
Erskine, Robert	6	Scheinberg, Paul	4
Fishman, William R.	1	Sherman, Spencer D.	8
Fritsche, Joni	4	Shea, William	3
Gianni, Daniel	6	Shindlecker, Tricia	3
Glazier, Jason	6	Sites, Frank R.	9
Goldberg, Steven M.	1	Snyder, Cleet E	4
Gorbach, Howard R.	6	Sornstein, Edward Z.	9
Gorman, Michael	6	Stark, Charles D.	3
Gullotta, Richard A.	4	Street, Ronald	11
Haeuser, Thomas A.	2	Thurrow, Dieter	8
Jennifer Hainstock	2	Valluzzo, Anthony	3
Hall, Paula S.	2	Veal, Matthew	8
Handelman, Albert G.	2	Veenstra, Kevin S.	3
Harris, David J.	6	Walsvick, Mark A.	8
Hobson, Robert L.	2	Wannen, Dale	8
Hughes, Don R.	10	Wargo, Ronald P.	3
Ingersoll, Kristen	2	Young, Marlon	3
Jacobs, Kenneth S.	2	Zaifman, Mark	8
Jenkins, Steven T.	10	Zimmerman, Sharon	8 & 9
Jigalin, Andrei	6		

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

Michael P. Diepenbrock

Diepenbrock Law
950 College Avenue
Santa Rosa, CA 95402
(707) 525-0404 – Fax: (707) 578-8216
Email: lawmpd@yahoo.com

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

Thomas A. Haeuser

466 First Street East
Sonoma, CA 95476
(707) 996-2131 – Fax: (707) 996-3076
Email: tom@haeuserlaw.com

Jennifer Hainstock

Attorney at Law
243 W. Spain Street
Sonoma, CA 95476
(707) 343-1443
Email: jennifer@hainstocklaw.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: kristen@noringlaw.com

Kenneth S. Jacobs

117 North Main Street
Sebastopol, CA 95472
(707) 829-7303
Email: 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

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
575 West College Avenue, Ste. 103
Santa Rosa, CA 95401
(707) 573-3901 – Fax: (707) 573-3933
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

Spaulding McCullough & Tansil LLP
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: bdrloffices@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

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@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
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
Professional Licenses/Designations: CPA

Linda Lampson

Zainer Rinehart Clarke CPA's
3510 Unocal Place, Suite 350
Santa Rosa, CA 95403
(707) 525-1163 – Fax: (707) 525-0331
Email: llampson@zrccpas.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

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

Umpqua Investments, Inc.
1322 4th Street
Santa Rosa, CA 95404
(707) 636-3461 – Fax: (707) 545-4102
Email: jcrouch@umpquainvestments.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@wcfinc.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@ipl.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

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
#OB0490

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

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, CDFIA, 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

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

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
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 Wannan

Sustaininvest Asset Management, LLC
555 Maria Drive
Petaluma, CA 94954
(707) 766-9480 – Fax: (707) 773-5006
Email: dale@sustaininvestmanagement.com
Professional Licenses/Designations: Series 65

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.

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

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: angellid@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

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

Deborah 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

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

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