



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

### MISSION STATEMENT

---

We are financial professionals dedicated to developing strong relationships on matters related to philanthropic planning in partnership with Rady Children's Hospital Foundation.

The mission of the Council is to Educate, Inspire and Support.

### EDUCATE

---

We seek to educate estate and financial planning professionals and community members about Rady Children's current developments and future goals, as well as the critical role that philanthropy plays in transforming pediatric healthcare.

### INSPIRE

---

We inspire estate and financial planning professionals and community members to build relationships with Rady Children's through volunteering, committee membership, advocacy and financial support

### SUPPORT

---

We support the mission of the Estates and Trust Council through philanthropic advocacy, inviting other professionals to join the Council and engaging in support of Rady Children's Hospital that is personally meaningful.



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

### EXECUTIVE COMMITTEE MEMBERS

**Jon R. Beyrer, CFP, EA - CHAIR**

Vice President, Wealth Management  
Blankinship & Foster, LLC  
420 Stevens Avenue, Suite 250  
Solana Beach, California 92075  
Phone: 858.755.5166  
Email: [beyrer@bfadvisors.com](mailto:beyrer@bfadvisors.com)

**Anna E. Diaz, CFP**

Dowling & Yahnke  
12265 El Camino Real, Suite 300  
San Diego, California 92130  
Phone: 858.509.9500  
Email: [anna.diaz@dywealth.com](mailto:anna.diaz@dywealth.com)

**Ronald A. Friedman, CPA**

Tax Partner  
PKF California  
2020 Camino del Rio North  
Suite 500  
San Diego, California 92108  
Phone: 619.238.1040, ext. 2141  
Email: [rfriedman@pkfsandiego.com](mailto:rfriedman@pkfsandiego.com)

**Carlee Harmonson**

PO Box 231  
Bigfork, Montana 59911  
Phone: 858.354.4082  
Email: [charmonson@gmail.com](mailto:charmonson@gmail.com)

**John L. Jenkins, AEP, CFP, CFF**

Chairman  
Asset Preservation Strategies, Inc.  
3636 Nobel Drive, Suite 440  
San Diego, California 92122  
Phone: 858.455.1825  
Email: [johnjenkins@asset-preservation.com](mailto:johnjenkins@asset-preservation.com)

**Leslie S. Klein, CFP, AEP**

The San Diego Foundation  
2508 Historic Decatur Road, Suite 200  
San Diego, California 92106  
Phone: 619.235.2300  
Email: [lesliek@sdfoundation.org](mailto:lesliek@sdfoundation.org)

**Cristanne M. Leitner, CPA**

Shareholder  
LEVITZACKS  
451 A Street, Suite 500  
San Diego, California 92101  
Phone: 619.578.7010  
Email: [cleitner@lz-cpa.com](mailto:cleitner@lz-cpa.com)

**Ashley Leightner**

Financial Advisor  
Edward Jones  
6265 Greenwich Drive, Suite 115  
San Diego, California 92122  
Phone: 858.658.0532  
Email: [ashley.leightner@edwardjones.com](mailto:ashley.leightner@edwardjones.com)

**Larry K. Manuel, CFP, MBA**

President  
Capital Accounts, Inc.  
4250 Executive Square, Suite 700  
La Jolla, California 92037  
Phone: 858.550.2811  
Email: [larry.manuel@lfg.com](mailto:larry.manuel@lfg.com)

**Jennifer McGibbons, Esq.**

Sullivan, McGibbons, Crickard &  
Associates, LLP  
12230 El Camino Real, Suite 330  
San Diego, California 92130  
Phone: 858.792.1190  
Email: [jmcbibbons@smalawsd.com](mailto:jmcbibbons@smalawsd.com)

**Kathleen Medina**

Director/Fiduciary Management  
Executive  
Southern California Region  
Union Bank - The Private Bank  
7807 Girard Avenue, Suite 200  
La Jolla, California 92037  
Phone: 858.551.5362  
Email: [kathleen.medina@unionbank.com](mailto:kathleen.medina@unionbank.com)

**Laura L. Nichols, Esq. APC**

Buchalter Law Firm  
655 West Broadway, Suite 1600  
San Diego, California 92101-8590  
Phone: 619.219.8065  
Email: [lnichols@Buchalter.com](mailto:lnichols@Buchalter.com)

**Barbara J. Norman, CFP**

Sage Path Solutions, LLC  
Founder  
5053 Marlborough Drive  
San Diego, California 92116  
Phone: 619.501.6011  
Email: [bnorman@sagepathsolutions.com](mailto:bnorman@sagepathsolutions.com)

**Rebecca O'Toole, Esq.**

Withers Bergman, LLP  
12830 El Camino Real, Suite 350  
San Diego, California 92130  
Phone: 858.400.1302  
Email: [rebecca.otoole@withersworldwide.com](mailto:rebecca.otoole@withersworldwide.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

**Lori Robinson**

First Vice President, Wealth Management  
UBS Financial Services, Inc.  
12220 El Camino Real, Suite 400  
San Diego, California 92130  
Phone: 858.947.7031  
Email: [lori.robinson@ubs.com](mailto:lori.robinson@ubs.com)

**Amber M. Smith**

Associate Vice President  
Morgan Stanley  
16644 West Bernardo Drive, Suite 400  
San Diego, California 92127  
Phone: 858.674.3931  
Email: [amber.smith@morganstanley.com](mailto:amber.smith@morganstanley.com)

**Christian F. Tresse**

Principal  
Bernstein Private Wealth Management  
Pacifica Tower  
4365 Executive Drive, Suite 700  
San Diego, California 92121  
Phone: 858.812.2235  
Email: [christian.tresse@bernstein.com](mailto:christian.tresse@bernstein.com)

**Debra J. Vella, Esq.**

Vella Law  
12555 High Bluff Drive, Suite 190  
San Diego, California 92130  
Phone: 858.299.0120  
Email: [dvella@vellalaw.net](mailto:dvella@vellalaw.net)

**Carrie S. Vilaplana**

Vice President  
J.P. Morgan Private Bank  
12860 El Camino Real, Floor 2  
San Diego, California 92130  
Phone: 858.752.8701  
Email: [carrie.vilaplana@jpmorgan.com](mailto:carrie.vilaplana@jpmorgan.com)

**Joan M. Wolfe, CPA**

Hamilton Tharp LLP  
323 North Pacific Coast Highway 101  
Solna Beach, California 92075  
Phone: 858.481.7702  
Email: [joan.wolfe@ht2cpa.com](mailto:joan.wolfe@ht2cpa.com)

**Dale E. Yahnke, CFP, CFA**

Partner  
Dowling & Yahnke, LLC  
12265 El Camino Real, Suite 300  
San Diego, California 92130  
Phone: 858.509.9500  
Email: [dale.yahnke@dywealth.com](mailto:dale.yahnke@dywealth.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

### COUNCIL MEMBERS

**John Altomare, Esq.**

Law Firm of John Altomare  
4364 Bonita Road, No. 425  
Bonita, California 91902  
Phone: 619.407.4097  
Email: [ja@Johnaltomarelaw.com](mailto:ja@Johnaltomarelaw.com)

**Monique Bourgeois Arias, CPA**

LevitZacks  
451 A St., Suite 500  
San Diego, California 92101  
Phone: 619.238.1077  
Email: [mbourgeoisarias@lz-cpa.com](mailto:mbourgeoisarias@lz-cpa.com)

**\*Alana C. Asmussen, CFA, CFP**

11370 Nahama Ln.  
San Diego, California 92130

**Katie Balatbat, CPA, Esq.**

Witham Mahoney & Abbott, LLP  
401 B Street, Ste 2220  
San Diego, California 92101  
Phone: 619-407-0505  
Email: [balatbat@wmalawfirm.com](mailto:balatbat@wmalawfirm.com)

**Danielle P. Barger, Esq.**

Partner  
Barger & Battiest Law, APC  
5075 Shoreham Place, Suite 280  
San Diego, California 92122  
Phone: 858.886.7000  
Email: [dbarger@dbsquaredlaw.com](mailto:dbarger@dbsquaredlaw.com)

**Sean Barret**

Co-Founder (Retired)  
Cornerstone Family Office  
1808 Aston Ave. Suite 150  
Carlsbad, California 92008  
Phone: 760.476.1376  
Email: [sean\\_barrett@yahoo.com](mailto:sean_barrett@yahoo.com)

**Elaine Kaminski Becerra**

Vice President, Wealth Management  
Northern Trust  
4747 Executive Drive, Suite 1100  
San Diego, California 92121  
Phone: 858-449-5173  
Email: [ek104@ntrs.com](mailto:ek104@ntrs.com)

**Zoe M. Benditt**

3975 Via Holgura  
San Diego, California 92130  
Phone: 619.602.6694  
Email: [zmb234@yahoo.com](mailto:zmb234@yahoo.com)

**Laura Benintend**

Fiduciary  
P.O. Box 230985  
Encinitas, California 92023  
Phone: 760.452.0904  
Email: [laurabfiduciary@gmail.com](mailto:laurabfiduciary@gmail.com)

**\*Colleen K. Callahan, CLU, ChFC**

Callahan Capital Management and  
Insurance Services, Inc.  
4765 Kenwick Court  
San Diego, California 92130  
Phone: 858.623.5900  
Email: [colleen@callahancapitalmgmt.com](mailto:colleen@callahancapitalmgmt.com)

**Danna Cannavino, Esq.**

Principal  
Cannavino & Stroud, APC  
2305 Historic Decatur Rd., Suite 100  
San Diego, California 92106  
Phone: 619.930.5443  
Email: [danna@sdestatelawyers.com](mailto:danna@sdestatelawyers.com)

**Shirley Cantu**

Wells Fargo Private Bank  
4655 Executive Drive, 10<sup>th</sup> Floor  
San Diego, California 92121  
Phone: 858.261.6242  
Email: [shirley.cantu@wellsfargo.com](mailto:shirley.cantu@wellsfargo.com)

**Helen Cheng, Esq.**

Withers Bergman LLP  
12830 El Camino Real, Suite 350  
San Diego, California 92130  
Phone: 619.564.6140  
Email: [helen.cheng@withersworldwide.com](mailto:helen.cheng@withersworldwide.com)

**Paul M. Cheverton, Esq.**

4976 Flaxton Terrace  
San Diego, California 92130  
Phone: 858.342.0627  
Email: [paulchev@roadrunner.com](mailto:paulchev@roadrunner.com)

**Kevin Christensen, CFP, AIF**

Financial Planner  
Aligned Financial Planning  
1420 Kettner Blvd, Suite 100  
San Diego, California 92101  
Phone: 858.357.8010  
Email: [kevin.d.christensen@lpl.com](mailto:kevin.d.christensen@lpl.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

**David B. Cohen, CPA**

Partner  
GYL CPAs and Advisors LLP  
3290 Avenida De Sueno  
San Diego, California 92009  
Phone: 619.840.2110  
Email: [dave@gyldecauwerllp.com](mailto:dave@gyldecauwerllp.com)

**Chrissa N. Corday, Esq.**

Corday & Hartney, PLC  
11665 Avena Place, Suite 209  
San Diego, California 92128  
Phone: 858.385.2772  
Email: [cncorday@chplc.com](mailto:cncorday@chplc.com)

**Krysta Cordill, CFA, CFP, CPA**

Partner/Advisor  
D'Arcy Capital Management, LLC  
12625 High Bluff Drive, Suite 314  
San Diego, California 92130  
Phone: 858.461.4391  
Email: [krysta@darcycapital.com](mailto:krysta@darcycapital.com)

**\*David W. Cortney, CPA**

Partner  
Square, Milner, Peterson,  
Miranda & Williamson, LLP  
3655 Nobel Drive, Suite 450  
San Diego, California 92122  
Phone: 858.597.4100  
Email: [dcortney@squarmilner.com](mailto:dcortney@squarmilner.com)

**Dawn Hall Cunneen, Esq.**

Estate Planning Attorney  
Cunneen Booth LLP  
2173 Salk Avenue, Suite 250  
Carlsbad, California 92008  
Phone: 760.292.0144  
Email: [dhc@cunneenbooth.com](mailto:dhc@cunneenbooth.com)

**Bradford N. Dewan, Esq.**

Miller, Monson, Peshel, Polacek &  
Hoshaw, APPLC  
402 West Broadway, Suite 950  
San Diego, California 92101  
Phone: 619.239.7777  
Email: [bdewan@mmpmh.com](mailto:bdewan@mmpmh.com)

**Julie M. Dewberry, Esq.**

Higgs, Fletcher & Mack  
401 W. A Street, Suite 2600  
San Diego, California 92101  
Phone: 619.595.4293  
Email: [dewberryj@higgslaw.com](mailto:dewberryj@higgslaw.com)

**Stephanie Downer, Esq.**

Buchalter, APC  
655 W Broadway, Suite 1600  
San Diego, California 92101  
Phone: 619.219.8068  
Email: [sdowner@buchalter.com](mailto:sdowner@buchalter.com)

**Whitney Drechsler, JD, LLM, CFP**

Director of Estates and Tax Solutions  
LourdMurray  
3611 Valley Centre Dr., Ste 125  
San Diego, California 92130  
Phone: 858.222.8050  
Email: [wdrechsler@LourdMurray.com](mailto:wdrechsler@LourdMurray.com)

**Precious M. Driver, CPA**

DeLoitte Tax, LLP  
655 W. Broadway, Suite 700  
San Diego, California 92101  
Phone: 619.237.6884  
Email: [pdriver@deloitte.com](mailto:pdriver@deloitte.com)

**Paul E. Drolson, CFP**

President  
Wealth Advisors, Inc.  
16909 Via De Santa Fe, Suite 202  
Rancho Santa Fe, California 92067  
Phone: 858.481.4088, ext. 101  
Email: [pdrolson@wealthadvisorsinc.com](mailto:pdrolson@wealthadvisorsinc.com)

**Jeffrey Dunigan**

UBS Financial Services, Inc.  
1200 Prospect Street, Suite 500  
La Jolla, California 92037  
Phone: 858.551.9419  
Email: [Jeffrey.dunigan@ubs.com](mailto:Jeffrey.dunigan@ubs.com)

**Clark C. Evans**

Vice President, Wealth Management  
Hall Private Wealth Advisors  
2305 Historic Decatur Road, Suite 100  
San Diego, California 92106  
Phone: 858.263.1675  
Email: [clark.evans@hallpwa.com](mailto:clark.evans@hallpwa.com)

**Donovan Filpi, CFP**

Merrill Lynch – Special Needs Team  
1000 Aviara Parkway, Suite 200  
Carlsbad, California 92011  
Phone: 760-930-3110  
Email: [donovan.r.filpi@ml.com](mailto:donovan.r.filpi@ml.com)

**Michele Fischbein, Esq.**

Tresp, Day and Associates, APC  
341 S. Cedros Avenue, Suite B  
Solana Beach, California 92075  
Phone: 858.755.6672  
Email: [michele@tresplaw.com](mailto:michele@tresplaw.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

**Francisco Garcia, Jr.**

Higgs Fletcher & Mack LLP  
401 W A St, Ste 2600  
San Diego, California 92101-7913  
Phone: 619-236-1551  
Email: [garciarf@higgslaw.com](mailto:garciarf@higgslaw.com)

**Kelly Garcia Arrillaga**

First Republic Bank  
12626 High Bluff Drive  
San Diego, California 92130  
Phone: 858.720.2911  
Email: [karrillaga@firstrepublic.com](mailto:karrillaga@firstrepublic.com)

**Cindy Gatlin**

Northern Trust  
Sr. Wealth Strategist  
4747 Executive Drive, Suite 1100  
San Diego, California 92121  
Phone: 858.824.1214  
Email: [cg259@ntrs.com](mailto:cg259@ntrs.com)

**Rebecca Gennaro**

Senior Philanthropic Specialist  
Wells Fargo Private Bank  
4655 Executive Drive, Suite 1000  
San Diego, California 92121  
Phone: 619.913.8210  
Email: [rebecca.gennaro@wellsfargo.com](mailto:rebecca.gennaro@wellsfargo.com)

**Ken M. Ghahremani, MBA**

Managing Director  
WestPac Wealth Partners  
4275 Executive Square, Suite 800  
La Jolla, California 92037  
Phone: 619.684.6400  
Email: [ken\\_ghahremani@thewp2.com](mailto:ken_ghahremani@thewp2.com)

**James L. Greene**

Director  
Sanli, Pastore & Hill, Inc.  
9921 Carmel Mountain Road, Suite 357  
San Diego, California 92129  
Phone: 619.246.8112  
Email: [jgreene@sphvalue.com](mailto:jgreene@sphvalue.com)

**Ronald L. Greenwald, MBA, SRES**

Broker Associate  
Premier Estates  
330 Encinitas Blvd, Suite 202D  
Encinitas, California 92024  
Phone: 760.390.0149  
Email: [rgreenwald@premiereestates.com](mailto:rgreenwald@premiereestates.com)

**\*Ann C. Harris, Esq**

Ann C. Harris, Attorney-at-Law  
1901 Camino Vida Roble, Suite 121  
Carlsbad, California 92008  
Phone: 760.431.9900  
Email: [harris@annharrislaw.com](mailto:harris@annharrislaw.com)

**Rodney J. Hatley, Esq., LL.M. (Tax)**

Founder  
Hatley Law Group, APC  
12636 High Bluff Drive Suite 400  
San Diego, California 92130  
Phone: 858.465.8001  
Email: [rod@hatleylawgroup.com](mailto:rod@hatleylawgroup.com)

**Kelly L. Hinds, Esq.**

Partner  
Greenman, Lacy, Klein, Hinds, Weiser  
Post Office Box 299  
900 Pier View Way  
Oceanside, California 92049-0299  
Phone: 760.722.1234  
Email: [kelly.hinds@glkhwh.com](mailto:kelly.hinds@glkhwh.com)

**Candise C. Holmlund, CFA, CFP, TEP, AEP**

Founder and President  
Alaethes Wealth, LLC  
PO Box 2108  
Rancho Santa Fe, California 92067  
AND/OR  
PO Box 10  
Glenbrook, Nevada 89413  
Phone: 858.735.9685  
Email: [candise@alaethes.com](mailto:candise@alaethes.com)

**Amy Hsiao, Esq.**

Hsiao Law  
4225 Executive Square, Unit 600  
La Jolla, California 92037  
Phone: 858.386.0998  
Email: [amy@hsiaolaw.com](mailto:amy@hsiaolaw.com)

**Aaron Hughes, JD, LLM**

Estate Planning Attorney  
Weiner Law  
12707 High Bluff Drive, Ste 125  
San Diego, CA 92130  
Phone: 858.356.9070  
Email: [aaron@weinerlegacylaw.com](mailto:aaron@weinerlegacylaw.com)

**Mark Hvasta, CPA**

Levering & Hvasta CPAs  
Post Office Box 400  
Fallbrook, California 92088  
Phone: 760.728.8393  
Email: [mhvasta@lhcpas.com](mailto:mhvasta@lhcpas.com)

**Jacqueline Isaac, Esq.**

Stevens Law Group  
12526 High Bluff Drive, Suite 200  
San Diego, California 92130  
Phone: 858.792.0909  
Email: [ji@jacquelineisaac.com](mailto:ji@jacquelineisaac.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

**Teresa Kakadelas, CFP, CDFA**  
Director of Financial Planning  
Blankinship & Foster, LLC  
420 Stevens Avenue Suite 250  
Solana Beach, California 92075  
Phone: 858.755.5166  
Email: [kakadelas@bfadvisors.com](mailto:kakadelas@bfadvisors.com)

**Hillel Katzeff, CFP**  
Senior Financial Planner  
Pure Financial  
3131 Camino Del Rio N Suite 1550  
San Diego, California 92108  
Phone: 619.814.4100 ext. 2300  
Email: [hillel.katzeff@purefinancial.com](mailto:hillel.katzeff@purefinancial.com)

**Megan Kornacker, CLPF**  
Foster Thornton  
12526 High Bluff Drive, Suite 350  
San Diego, California 92130  
Phone: 858.350.1391  
Email: [megan@fosterthornton.com](mailto:megan@fosterthornton.com)

**Paul Krause, CLTC**  
Krause Wealth Partners  
4275 Executive Square, Suite 200  
La Jolla, California 92037  
Phone: 858.367.0012  
Email: [paul@krausepartners.com](mailto:paul@krausepartners.com)

**Stella Larsen, JD, CPWA, TEP**  
Executive Director  
JP Morgan Private Bank  
12860 El Camino Real, Suite 200  
La Jolla, California 92130  
Phone: 858.812.6130  
Email: [stella.m.larsen@jpmorgan.com](mailto:stella.m.larsen@jpmorgan.com)

**Michael B. Lees, Esq.**  
Solomon Ward Seidenwurm & Smith LLP  
401 B Street, Suite 1200  
San Diego, California 92101  
Phone: 619.238.4845  
Email: [mlees@swsslaw.com](mailto:mlees@swsslaw.com)

**Katie Balatbat**  
Associate Attorney & CPA  
Miller Monson Peshel Polacek & Hoshaw  
402 W. Broadway Suite 950  
San Diego, California 92101  
Phone: 619.239.7777  
Email: [katielepore@mmpmh.com](mailto:katielepore@mmpmh.com)

**DeEtte Loeffler, Esq.**  
Partner  
DeEtte Loeffler, APLC  
2305 Historic Decatur Rd, Ste 100  
San Diego, California 92106  
Phone: 619.859.5201  
Email: [dloeffler@tlp-sd.com](mailto:dloeffler@tlp-sd.com)

**Denise L. Martin**  
First American Trust  
4380 La Jolla Village Drive, Suite 200  
San Diego, California 92122  
Phone: 858.410.5752  
Email: [demartin@firstam.com](mailto:demartin@firstam.com)

**David B. Mather II, MBA**  
Reginal Director, Financial Planner  
Prudential  
7676 Hazard Center Drive, Suite 600  
San Diego, California 92108  
Phone: 619.358.8854  
Email: [david.mather@prudential.com](mailto:david.mather@prudential.com)

**Peter Merrick**  
The Ice Solution  
7737 Moon Ridge Place  
La Jolla, California 92037  
Phone: 858.264.9595  
Email: [peter@theicesolution.com](mailto:peter@theicesolution.com)

**Jason S. Mubarak, CFP**  
Senior Vice President  
Morgan Stanley  
6037 La Flecha/Post Office Box 415  
Rancho Santa Fe, California 92067  
Phone: 858.613.8184  
Email:  
[jason.s.mubarak@morganstanley.com](mailto:jason.s.mubarak@morganstanley.com)

**\*Michael Muehl**  
Senior Vice President-Investments  
Wells Fargo Advisors  
13520 Evening Creek Drive, Suite 500  
San Diego, California 92128  
Phone: 858.248.8813  
Email:  
[michael.muehl@wellsfargoadvisors.com](mailto:michael.muehl@wellsfargoadvisors.com)

**Claire New, Esq.**  
4303 Caminito Del Zafiro  
San Diego, California 92121  
Phone: 913.748.7945  
Email: [claire.new10@gmail.com](mailto:claire.new10@gmail.com)

**Michael "Mike" Novak**  
Professional Fiduciary  
ProFiduciary  
1842 Third Avenue  
San Diego, California 92101  
Phone: 619.456.5650  
Email: [mnovak@profiduciary.com](mailto:mnovak@profiduciary.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

**\*James E. Olson, CLU, ChFC**

Retired  
3530 Bayonne Drive  
San Diego, California 92109  
Phone: 858.740.4876  
Email: [olsonnml@aol.com](mailto:olsonnml@aol.com)

**Jared Papin**

First Vice President – Wealth  
Management  
UBS Financial Services  
1200 Prospect Street, Suite 500  
La Jolla, California 92037  
Phone: 858.729.5212  
Email: [jared.papin@ubs.com](mailto:jared.papin@ubs.com)

**Sara A. Pike, Esq.**

Withers Bergman, LLP  
12830 El Camino Real Suite 350  
San Diego, California 92130  
Phone: 619.564.6220  
Email: [sara.pike@withersworldwide.com](mailto:sara.pike@withersworldwide.com)

**Jeff Platt, JD, CFA, CFP**

Platt Wealth Management  
3838 Camino del Rio North, Suite 365  
San Diego, California 92108  
Phone: 619.255.9554  
Email: [jeff@plattwm.com](mailto:jeff@plattwm.com)

**Allen J. Reibman, CPA**

Reibman & Company  
3131 Camino Del Rio, North  
San Diego, California 92108

**Kelly K. Reid, Esq.**

President  
Reid Law, APC  
319 East Second Avenue  
Escondido, California 92025  
Phone: 760.746.6420  
Email: [kellyreid@reidlawca.com](mailto:kellyreid@reidlawca.com)

**Gregory Richardson, CFP, MPAS**

Partner & Wealth Advisor  
CI Dowling & Yahnke, LLC  
12265 El Camino Real, Suite 300  
San Diego, California 92130  
Phone: 858.509.9500  
Email: [greg.richardson@dywealth.com](mailto:greg.richardson@dywealth.com)

**Timothy Riley**

Mediator, West Coast Resolution Group  
4080 Porte La Paz Unit 6  
San Diego, California 92122  
Phone: 649.957.9697  
Email: [tgrmediator2020@gmail.com](mailto:tgrmediator2020@gmail.com)

**Jay Robinson-Duff**

Vice President, Wealth Management  
Advisor  
First American Trust  
4380 La Jolla Drive, Suite 200  
San Diego, California 92122  
Phone: 858.410.5755  
Email: [jrobinson-duff@firstam.com](mailto:jrobinson-duff@firstam.com)

**Martina M. Roland, Esq.**

Brennan & Roland, APC  
7777 Fay Avenue, Suite 206  
La Jolla, California 92037  
Phone: 858.454.4233  
Email: [mr@brennanroland.com](mailto:mr@brennanroland.com)

**Jeremy Runnels**

Partner  
West Coast Financial, LLC  
4330 La Jolla Village Drive, Suite 130  
San Diego, California 92121  
Phone: 858.333.6133  
Email: [jeremy@wcfinc.com](mailto:jeremy@wcfinc.com)

**Amy M. Rypins, CPA, Esq.**

Law Offices of Amy Rypins  
169 Saxony Road, Suite 109  
Encinitas, California 92024  
Phone: 760.334.8563  
Email: [amy@rypinslaw.com](mailto:amy@rypinslaw.com)

**Lisa A. Samuth**

Weitzen, Phillips, Samuth & Sinex LLP  
12750 High Bluff Drive, Suite 400  
San Diego, California 92130  
Phone: 858.793.0300  
Email: [lisa@weitzenphillips.com](mailto:lisa@weitzenphillips.com)

**Jason Schingler, Esq.**

Worden Williams LLP  
472 Stevens Avenue, Suite 100  
Solana Beach, California 92075  
Phone: 858.755.6604  
Email: [js@wordenwilliams.com](mailto:js@wordenwilliams.com)

**Todd J. Schneider**

Sr. Vice President – Sr. Wealth Planning  
Strategist  
Wells Fargo Wealth & Investment  
Management  
4655 Executive Drive, Suite 1000  
San Diego, California 92121  
Phone: 858.261.6290  
Email: [todd.schneider@wellsfargo.com](mailto:todd.schneider@wellsfargo.com)





## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

**Deb Sims**

Engaging Women in Wealth & Estate  
Management Group  
P.O. Box 926  
Rancho Santa Fe, California 92067  
Phone: 858.756.0004  
Email:  
[dsims@estatemanagementgroup.com](mailto:dsims@estatemanagementgroup.com)

**Leia Stapleton, CFP, TED, CDPA**

President  
Stapleton Financial  
4275 Executive Square, Suite 800  
La Jolla, California 92037  
Phone: 858.458.0991  
Email: [leahstapleton@me.com](mailto:leahstapleton@me.com)

**\*Jack E. Stephens, J.D., LL.M.**

Stephens Law Group  
12526 High Bluff Drive, Suite 200  
San Diego, California 92130  
Phone: 858.792.0909  
Email: [jes@jackstephens.com](mailto:jes@jackstephens.com)

**Danielle Stroud, Esq.**

Principal  
Cannavino & Stroud, APC  
2305 Historic Decatur Road, Suite 100  
San Diego, California 92106  
Phone: 619.930.5443  
Email: [danielle@sdestatelawyers.com](mailto:danielle@sdestatelawyers.com)

**\*William Super, CPA**

William Super CPAs & Consultants  
2188 Saffron Way  
Fallbrook, California 92028  
Phone: 858.531.7232  
Email: [wsuper1@gmail.com](mailto:wsuper1@gmail.com)

**Monica Szakos**

President  
Asset Preservation Strategies, Inc.  
3636 Nobel Drive, Suite 440  
San Diego, California 92122  
Phone: 858.455.1825  
Email: [monicaszakos@asset-preservation.com](mailto:monicaszakos@asset-preservation.com)

**Buddy Thomas, CFP**

Chief Planning Officer  
Superior Planning, Inc.  
9820 Willow Creek Road Suite 105  
San Diego, California 92131  
Phone: 858.546.1046  
Email: [buddy@superplan.com](mailto:buddy@superplan.com)

**Peter C. Thoms, CFA**

Founder & Portfolio Manager  
Orion Capital Management, LLC  
1330 Orange Avenue, Suite 302  
Coronado, California 92118  
Phone: 619.435.1701  
Email: [thoms@orioncapitalmgmt.com](mailto:thoms@orioncapitalmgmt.com)

**Dustin B. Tracy, CFP, CDFA, CEPA**

Account Vice President  
UBS Financial Services  
Waterfront Wealth Management Group  
600 W. Broadway, Suite 2100  
San Diego, California 92101  
Phone: 619.557.4867  
Email: [dustin.tracy@ubs.com](mailto:dustin.tracy@ubs.com)

**Kimberly A. Travaglia, CFP, CTFA**

Senior Vice President  
Senior Wealth Planner  
Wells Fargo Wealth & Investment  
Management  
5 Park Plaza, Floor 20  
Irvine, California 92614  
Phone: 619.693.2575  
Email:  
[kimberly.a.travaglia@wellsfargo.com](mailto:kimberly.a.travaglia@wellsfargo.com)

**Jeffrey Treut, VP**

Whittier Trust  
1600 Huntington Drive  
South Pasadena, CA 91030  
Phone: 626.463.2592  
Email: [jtreat@whittiertrust.com](mailto:jtreat@whittiertrust.com)

**Marena Tufenkjian**

CFP, CRPS Wealth Manager, VP  
First Republic Private Wealth  
Management  
12626 High Bluff Drive, Suite 100  
San Diego, California 92130  
Phone: 858.720.2903  
Email: [mtufenkjian@firstrepublic.com](mailto:mtufenkjian@firstrepublic.com)

**Michael A. Van Horne, Esq.**

Michael A. Van Horne, Attorney at Law  
600 W. Broadway, Suite 800  
San Diego, CA 92101  
Phone: 619.964.6898  
Email: [mvanhorne@mvanhornelaw.com](mailto:mvanhorne@mvanhornelaw.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

**Victor Vera Morales**

Partner Private Wealth Advisor

US Bank

862 Wilbur Ave

San Diego, California 92104

Phone: 619.754.5474

Email: [victor.veramoraes@usbank.com](mailto:victor.veramoraes@usbank.com)

**Robert Waltz**

La Jolla Asset Management

4350 Executive Drive, Suite 115

San Diego, California 92121

Phone: 858.453.9915

Email: [rwaltz@ljam.com](mailto:rwaltz@ljam.com)

**Kaitlyn Welling**

Fiduciary

Foster Thornton Welling

12526 High Bluff Drive, Suite 360

San Diego, California 92130

Phone: 858.704.4050

Email: [katie@fosterthornton.com](mailto:katie@fosterthornton.com)

**\*Ellen Whelan, Esq.**

DLA Piper LLP

4365 Executive Drive, Suite 1100

San Diego, California 92121-2133

Phone: 858.677.1469

Email: [ellen.whelan@dlapiper.com](mailto:ellen.whelan@dlapiper.com)



## RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

### RADY CHILDREN'S GIFT PLANNING TEAM

**Kaye de Lancey, CFRE**

Director of Gift Planning  
Rady Children's Hospital Foundation  
3020 Children's Way, MC 5005  
San Diego, California 92123  
Phone: 858.966.7584  
Email: [kdelancey@rchsd.org](mailto:kdelancey@rchsd.org)

**Laura Mello**

Director of Gift Planning  
Rady Children's Hospital Foundation  
3020 Children's Way, MC 5005  
San Diego, California 92123  
Phone: 858.254.7896  
Email: [lmello@rchsd.org](mailto:lmello@rchsd.org)

**Elise Webster**

Vice President, Advancement &  
Gift Planning  
Rady Children's Hospital Foundation  
3020 Children's Way, MC 5005  
San Diego, California 92123  
Phone: 858.966.7537  
Email: [ewebster@rchsd.org](mailto:ewebster@rchsd.org)

**Joanne Garcia**

Administrative Assistant  
Rady Children's Hospital Foundation  
3020 Children's Way, MC 5005  
San Diego, California 92123  
Phone: 858-576-1700 ext. 245804  
Email: [jgarcia5@rchsd.org](mailto:jgarcia5@rchsd.org)