

## **Consultant Credentials**

Our consulting staff is varied and diverse. Our past and present consultants possess a strong set of experiences and credentials. Depending on the expertise your project needs and the availability of our consultants, we may select from the following consulting credentials:

### **Education and Certifications**

University of Southern California, BS Business Administration  
University of California, Los Angeles, BS Economics  
University of California, Berkeley, BS Business Administration  
University of California, Davis, BS EEB  
Certified Estate Advisor, National Association of Financial and Estate Planning  
Master Financial Professional,™ American Academy of Financial Management

### **Specialized Real Estate Experience**

California Bureau of Real Estate Brokers  
Commercial office leasing  
Retail leasing  
Industrial leasing  
Commercial / Industrial development  
National Association of Realtors  
California Association of Realtors  
Glendale Board of Realtors

### **Specialized Fiduciary and Investment Training**

National Association of Financial and Estate Planning, Los Angeles, CA  
Cannon Financial Institute, Boston University, Boston, MA  
MassMutual, Estate and Business Succession Planning, Los Angeles, CA  
College for Financial Planning, Estate Planning for Qualified Plans and IRAs  
New York Stock Exchange - Floor Broker

### **Recognition and Awards**

2013-2022 Los Angeles Magazine Five-Star Wealth Manager\*  
International Who's Who of Professionals  
Who's Who in Financial Planning  
Best in Burbank

\*Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2013-2022 Five Star Wealth Managers.

## ***Consultant Credentials***

### **Community Involvement** *(past and current)*

President, San Fernando Valley Estate Planning Council  
Trustee, Pasadena Historical Museum  
Chairman, Los Angeles Trust and Tax Forum  
Board Member, Leave-A-Legacy, Planned Giving Round Table of Southern California  
Member, Los Angeles Estate Planning Council  
Member, Western Pension and Benefits Conference  
San Fernando Valley Estate Planning Council  
Insured Retirement Institute

### **Other Information and Recognition** *(past and current)*

Trust, Investment, and Estate Planning Speaker  
All-American Team, American Funds Group  
Continuing Education Sponsor:  
    Certified Financial Planner® Board of Standards, Inc.  
    Certified Public Accountants  
    California Department of Insurance Sponsor #112884  
Instructor, Glendale College, Adult Education  
Real Estate Educator, California Community Colleges, Real Estate Education Center

### **Contact Information**

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