

# 2007

## Directory of Professional Advisors for the LGBT Community



horizons foundation

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*If you know of other advisors who should be listed in this directory, please contact Henry Pacheco at 415.398.2333 or visit our website at [www.horizonsfoundation.org](http://www.horizonsfoundation.org) to download the appropriate forms.*

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# About This Directory

Horizons Foundation is proud to present the 2007 edition of our *Directory of Professional Advisors for the LGBT Community*. Created in response to numerous requests for referrals to such advisors, this directory is intended to assist our donors and others in the community seeking professional advice that considers the particular legal, economic, and social needs of lesbian, gay, bisexual, or transgender people.

The directory—which is updated annually—includes attorneys, financial advisors, accountants, and others who offer services that integrate the philanthropic needs of LGBT clients. In compiling it, Horizons cast a wide net by asking hundreds of advisors to complete a questionnaire describing their services; only those who returned the questionnaire are included here. We welcome contact from advisors interested in being listed in future editions.

Horizons is committed not only to serving the needs of donors, but also to promoting our community's philanthropic values and potential. It is our hope that as people engage the services of professional advisors, all parties keep in mind the philanthropic dimensions and possibilities of the decisions to be made. Towards that end, we also offer an annual Philanthropy Series of seminars, with sessions tailored both to the donor community and to professional advisors.

We hope that you find this *Directory of Professional Advisors* useful. For more information and resources specifically for donors as well as professional advisors, please see our website at [www.horizonsfoundation.org](http://www.horizonsfoundation.org).

# About Horizons Foundation

Horizons Foundation, a philanthropic social justice organization, serves the lesbian, gay, bisexual, and transgender community throughout the Bay Area and beyond. For over 25 years, we have been meeting the needs, advancing the rights, and celebrating the lives of LGBT people through a diverse range of programs, services, and initiatives that support LGBT organizations in our community.

Horizons also supports LGBT donors, without whose commitment and generosity our community's advocates and service providers could not exist. Horizons provides philanthropic education programs, customized services for individual donors, and a wide range of donor-advised, field of interest, and scholarship funds. Moreover, Horizons is committed to increasing the number of active donors who support LGBT causes and organizations.

We also provide philanthropic advice to donors and to professional advisors assisting clients with planned gifts and donor-advised funds.

For more information about making a planned gift or opening a donor-advised fund, please contact Julie Dorf, Director of Philanthropic Services and Development, at 415.398.2333 x103.

## **Disclaimer**

*Horizons Foundation offers these lists as a resource and not as an endorsement of the qualifications or services of any individual, partnership, corporation, or any other entity listed. We advise you to conduct your own investigation before engaging the services of any of the advisors listed.*

*Horizons retains additional information about each advisor, which is available upon request.*

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For more information on donor-advised funds  
contact Julie Dorf at 415.398.2333 or  
[jdorf@horizonsfoundation.org](mailto:jdorf@horizonsfoundation.org)

**horizons foundation**

# Estate Planning Attorneys

## **David Alexander**

Law Office of David Alexander  
4061 East Castro Valley Blvd. #125  
Castro Valley, CA 94552  
TEL: 510.538.0272  
FAX: 510.538.1272  
EMAIL: dalexander@dajaxlaw.com  
WEB: www.dajaxlaw.com

*David J. Alexander provides legal services to the LGBT community in the areas of family law, wills, trusts, and mediation.*

## **Judith Laurer Baer**

3929 24th Street  
San Francisco, CA 94114  
TEL: 415.821.6700  
FAX: 415.821.2045  
EMAIL: jbaerlaw@aol.com

*Judith Baer specializes in estate planning and probate/trust administration, with over 26 years' experience.*

**Alma Soongi Beck, JD, LLM, Taxation**

The Beck Law Group  
101 Howard Street, Suite 490  
San Francisco, CA 94105  
TEL: 415.642.9930  
FAX: 415.593.9951  
EMAIL: [alma@becklawgroup.com](mailto:alma@becklawgroup.com)  
WEB: [www.becklawgroup.com](http://www.becklawgroup.com)

*The Beck Law Group provides legal services for the LGBT community in the areas of probate and trust administration, estate planning and will drafting, domestic partnership planning, property tax titling, and co-ownership issues.*

**Barbara M. Beery**

Law Offices of Barbara M. Beery,  
Trusts and Estates  
1814 Franklin, Suite 502  
Oakland, CA 94612  
TEL: 510.835.2353  
FAX: 510.251.3438  
EMAIL: [barbara@beerylaw.com](mailto:barbara@beerylaw.com)

*Barbara M. Beery is an attorney and CPA with a master's in law in tax, offering advanced estate tax and trust planning based on personal, tax, business, and charitable goals to the LGBTQ community and others; trust administration and probate.*

**Boone Callaway**

Law Offices of Callaway and Wolf  
785 Market Street, Suite 1150  
San Francisco, CA 94103  
TEL: 415.541.0300  
FAX: 415.777.6262

*Callaway and Wolf provide reasonable, fixed-price estate planning services, primarily to the gay, lesbian, bisexual, and transgender community.*

**Diane Cash**

1300 Clay, Suite 820  
Oakland, CA 94612  
TEL: 510.763.5611  
FAX: 510.763.3430  
EMAIL: [dcash@sffestateplanner.com](mailto:dcash@sffestateplanner.com)  
WEB: [www.sffestateplanner.com](http://www.sffestateplanner.com)

*Diane R. Cash is a certified specialist in estate planning, probate, and trust law with over 20 years of experience, particularly with the LGBT community.*

**B. Kyle Childress**

M. Jean Johnston Attorneys at Law  
220 Montgomery Street, 15th Floor  
San Francisco, CA 94104  
TEL: 415.986.1060  
FAX: 415.397.1577  
EMAIL: kyle@johnstonchildress.com

*The law offices of M. Jean Johnston have over 35 years of combined experience, and offer advanced trust and estate planning for gay, lesbian, and other non-traditional families that includes estate tax planning, charitable giving, and business succession.*

**Susan B. Cohen**

1010 Grayson, Suite 2  
Berkeley, CA 94710  
TEL: 510.540.6333  
FAX: 510.540.6305  
EMAIL: sbcohen@sonic.net

*Susan Cohen has an elder law practice that specializes in advising conservators, trustees, and other fiduciaries; elder financial abuse litigation; estate and long term care/Medi-Cal planning.*

**James B. Creighton**

Creighton Law Offices  
520 S. El Camino Real, Suite 600  
San Mateo, CA 94402-1743  
TEL: 650.344.0700  
FAX: 650.344.3312  
EMAIL: james@creightonlaw.com  
WEB: www.creightonlaw.com

*James B. Creighton specializes in providing estate planning, probate, trust administration, business succession planning, and elder law services to his clients, especially single and coupled members of the LGBT community.*

**Carole S. Cullum**

Cullum Law Offices, PC  
1390 Market Street, Suite 818  
San Francisco, CA 94102  
TEL: 415.863.5300  
FAX: 415.373.0483  
EMAIL: carole@cullumlaw.com  
WEB: www.cullumlaw.com

*Lesbian attorney with over 20 years' experience; family law specialist with experience in LGBT law, including domestic partnership law, adoption, partnership agreements, and estate planning.*

**W. Edward Dean**

Dean & Smith, LLP  
555 Montgomery Street, Suite 1210  
San Francisco, CA 94111  
TEL: 415.352.1440  
FAX: 415.352.1441  
EMAIL: ed@deansmithlaw.com  
WEB: www.deansmithlaw.com

*Edward Dean protects wealth through estate and charitable tax planning. He prepares trusts, wills, limited partnerships, limited liability companies, and property agreements for domestic partners and individual members of the LGBT community. Mr. Dean also advises clients who want to sell or bequeath property tax-free through the use of charitable remainder and lead trusts.*

**Jill Dodd**

Steeffel, Levitt & Weiss  
One Embarcadero Center, 30th Floor  
San Francisco, CA 94111  
TEL: 415.788.0900  
FAX: 415.788.2019  
EMAIL: jdodd@steeffel.com  
WEB: www.steeffel.com

*Jill Dodd's practice focuses on the representation of high net worth individuals and families in all aspects of gift and estate planning, with a special emphasis on philanthropic giving.*

**Erik Dryburgh**

Attorney at Law  
Silk, Adler & Colvin: A Law Corporation  
Russ Building, Suite 1220  
235 Montgomery Street  
San Francisco, CA 94104  
TEL: 415.421.7555  
FAX: 415.421.0712  
EMAIL: dryburgh@silklaw.com  
FAX: www.silklaw.com

*Erik Dryburgh works with donors and charities on charitable giving matters, including creating charitable remainder trusts, private foundations, and other gift structures.*

**David Gellman**

Goldstein, Gellman, Melbostad,  
Gibson & Harris, LLP  
1388 Sutter Street, Suite 1000  
San Francisco, CA 94109-5454  
TEL: 415.621.5600  
FAX: 415.673.5606  
EMAIL: dgellman@g3mh.com  
WEB: www.g3mh.com

*David Gellman is an estate planning attorney with over 25 years' experience in same-gender relationship planning and co-ownership agreements (TICs).*

**Roger S. Gross**

Attorney at Law  
317 Noe Street  
San Francisco, CA 94114  
TEL: 415.861.5225  
FAX: 415.552.1273  
EMAIL: RGrossAtty@aol.com

*Roger Gross is an experienced estate planning, trust, and probate attorney who has practiced in these areas for over 25 years.*

**Jean Johnston**

M. Jean Johnston Attorneys at Law  
220 Montgomery Street, 15th Floor  
San Francisco, CA 94104  
TEL: 415.986.1060  
FAX: 415.397.1577  
EMAIL: jean@johnstonchildress.com  
WEB: www.johnstonchildress.com

*The law offices of M. Jean Johnston have over 35 years of combined experience, and offer advanced trust and estate planning for gay, lesbian, and other non-traditional families that include estate tax planning, charitable giving, and business succession.*

**Ellen I. Kahn**

Sideman & Bancroft, LLP  
1 Embarcadero Center, 8th Floor  
San Francisco, CA 94111  
TEL: 415.392.1960  
FAX: 415.382.0827

*Ellen specializes in estate planning, with a special focus on working with individuals and families with significant wealth. She represents individuals and fiduciaries in all aspects of estate planning and the estate and trust administration process. Ellen and her firm provide a full range of services to domestic partners and those contemplating domestic partnership, including tax and estate planning, domestic partnership agreements, and dissolution of domestic partnerships.*

**Mario Kashou**

Farallon Law Group  
459 Fulton Street, Suite 102  
San Francisco, CA 94102  
TEL: 415.255.2450  
FAX: 415.255.2451  
EMAIL: mkashou@farallonlaw.com  
WEB: www.farallonlaw.com

**Deb L. Kinney**

DLK Law Group  
One Bush Street, Suite 1150  
San Francisco, CA 94104  
TEL: 415.693.0550  
FAX: 415.693.0500  
EMAIL: deb@dlklawgroup.com  
WEB: www.dlklawgroup.com

1160 North Dutton Avenue, Suite 120  
Santa Rosa, CA 95401  
TEL: 707.237.7371  
FAX: 707.237.7371  
EMAIL: info@dlklawgroup.com

*DLK Law Group provides a comprehensive, values-based approach to estate planning, focusing specifically on the needs of the LGBT community.*

**Richard J. Lee**

Law Offices of Richard J. Lee  
11 Embarcadero West, Suite 140  
Oakland, CA 94607-4543  
TEL: 510.272.0200 x304  
FAX: 510.451.3931  
EMAIL: rjl@rjleelaw.com  
WEB: www.rjleelaw.com

*Richard J. Lee is an attorney with 32 years of experience specializing in estate planning, probate, elder law, and business transactional matters, including nonprofit corporations.*

**Marianne Malveaux**

Omnipresent, Inc.  
PO Box 4278  
Vallejo, CA 94590  
TEL: 510.524.7644  
FAX: 415.524.7728  
EMAIL: cfamalveaux@msn.com

*Providing the following services in San Francisco, Alameda, Contra Costa, and Solano counties: estate planning, probate and trust administration (including estate tax preparation), conservatorships, and related litigation; transaction contracts, business entity formation/dissolutions; financial consulting; and investment planning and management.*

**Anthony Marzo**

Law Office of Anthony J. Marzo  
685 Market Street, Suite 460  
San Francisco, CA 94105  
TEL: 415.908.0820  
FAX: 415.908.0819  
EMAIL: amarzo@marzolaw.com  
WEB: www.marzolaw.com

*Specializing in wills and trusts, estate planning and wealth preservation, probate and trust administration, domestic partnership and co-habitation agreements, contract and settlement negotiations, business formation and transactions, and business taxation issues.*

**Jane Brindle Miller**

715 Colorado Avenue, Suite A

Palo Alto, CA 94303

TEL: 650.321.6011

FAX: 650.323.1310

EMAIL: jane@janemillerlaw.com

WEB: www.janemillerlaw.com

*Jane Miller specializes in estate planning, trust, and probate law with over 25 years of experience in advising clients in selecting, implementing, and administering their estate plans, and on related tax issues.*

**Peter S. Myers**

The Myers Law Firm, PC

100 Spear Street, Suite 1430

San Francisco, CA 94105

TEL: 415.896.1500

FAX: 415.896.5068

EMAIL: myerslawfirm@aol.com

WEB: www.themyerslawfirm.com

*Certified specialist in estate planning, trust, and probate law with expertise in business succession and tax.*

**Susan Alexander Myers**

Ruben Law Firm

650 California Street, 25th Floor

San Francisco, CA 94108

TEL: 415.399.6830

FAX: 415.391.0140

EMAIL: smyers@rubenlawfirm.com

WEB: www.rubenlawfirm.com

*The Ruben Law Firm represents clients in estate planning and business succession planning, probate and trust administration, probate and trust litigation, as well as in the family law area of pre-domestic partnership registration agreements, and dissolution and custody matters.*

**Rowena Navia**

Kato, Feder & Suzuki, LLP

685 Market Street, Suite 490

San Francisco, CA 94105

TEL: 415.974.5715

*Established in 1987, Kato, Feder & Suzuki, LLP maintains a civil practice with strong emphasis on estate planning and serving the unique needs of frail and older persons. Concentration areas include estate planning, descendants' estate planning for incapacity conservatorships, long-term care needs, elder abuse, public benefits programs, taxes, small businesses, nonprofit corporations, and community education.*

**Laura J. O’Kane**

1 Bush Street, Suite 1150  
San Francisco, CA 94104  
TEL: 415.398.9044  
FAX: 415.520.0808  
EMAIL: ljokane@ljokanelaw.com  
WEB: www.ljokanelaw.com

*The Law Offices of Laura O’Kane provide estate planning, probate, trust administration, business succession planning, and tax planning for its clients throughout the LGBT community.*

**Virginia Palmer**

Fitzgerald, Abbott & Beardsley, LLP  
1221 Broadway, 21st Floor  
Oakland, CA 94612  
TEL: 510.451.3300  
FAX: 510.451.1527  
EMAIL: vpalmer@fablaw.com  
WEB: www.fablaw.com

*Virginia Palmer is an attorney with 25 years’ experience in providing estate planning, probate and trust administration, conservatorships, elder law expertise, and related litigation for clients throughout the greater Bay Area. She is recognized by CEB as an authority on estate planning in California domestic partnerships.*

**Linda Scaparotti**

Law Offices of Linda Scaparotti  
180 Montgomery, Suite 2000  
San Francisco, CA 94104  
TEL: 415.434.9600  
FAX: 415.434.9303  
EMAIL: lindascap@aol.com  
WEB: www.scaplaw.com

*Linda Scaparotti has over 25 years of experience in estate planning and family law services specifically for the LGBT community.*

**Mark A. Senick**

317 Noe Street  
San Francisco, CA 94114  
TEL: 415.252.9800  
FAX: 415.252.9812  
EMAIL: msenick@pacbell.net

*Mark Senick is an attorney specializing in estate planning and probate, small business, and domestic partner issues.*

**Thomas Stikker**

Dudnick Detwiler Rivin & Stikker, LLP  
351 California Street, 15th Floor  
San Francisco, CA 94104  
TEL: 415.982.1400  
WEB: 415.982.1401  
EMAIL: stikker@ddrs.com  
WEB: www.ddrs.com

*Thomas J. Stikker offers a broad range of legal services relating to estate planning and the administration of trusts and estates for high net worth individuals.*

**Heather R. Stoneman**

Jewel & Stoneman, LLP  
220 Montgomery Street, Suite 484  
San Francisco, CA 94104  
TEL: 415.394.6800  
FAX: 415.394.6807  
EMAIL: hstoneman@legacylaw.com  
WEB: www.legacylaw.com

*Jewel & Stoneman, LLP focuses exclusively on helping individuals and families plan for life, deal with death, resolve conflict, and give to the community.*

**Susan M. von Herrmann**

Fitzgerald Abbott & Beardsley LLP  
1221 Broadway, 21st Floor  
Oakland CA 94612  
TEL: 510.451.3300  
FAX: 510.451.1527  
EMAIL: svonherrmann@fablaw.com

**Helene Wenzel**

Law Office of Helene V. Wenzel  
2000 Van Ness, Suite 312  
San Francisco, CA 94109  
TEL: 415.359.0223  
FAX: 415.359.0220  
EMAIL: wenzellaw@earthlink.net  
WEB: www.caelderlaw.com

*Helene V. Wenzel is a solo practitioner in estate planning and elder law. Her estate planning practice includes the preparation of wills and trusts; durable powers of attorney and advance health care directives; trust administration and probate; and charitable giving. Her elder law practice focuses on planning for retirement; incapacity; conservatorships; special needs trusts; long-term and nursing home care; asset management; and Medi-Cal eligibility. In addition to her focus on elders, Helene also counsels and works with the greater LGBT population and with same-sex couples and registered domestic partners on these issues.*

## Financial Advisors

### **Jeff Ahrens**

Oppenheimer and Co.  
580 California Street, Suite 2300  
San Francisco, CA 94104  
TEL: 415.438.3076  
FAX: 415.438.2985  
EMAIL: jeffrey.ahrens@opco.com  
WEB: www.opco.com

*As a team, Jeff Ahrens and Jean Terauds use a consultative approach to financial asset management, helping clients identify their financial needs and assisting them in finding suitable solutions. Their goal is to help clients understand their financial position, have confidence in their investment decisions, and feel optimistic about their future.*

### **Rebecca Balin**

PO Box 1117  
Mill Valley, CA 94942-1117  
TEL: 415.339.0339  
EMAIL: rebeccab@unforgettable.com

*Rebecca Balin offers personalized financial life planning, focusing on socially responsible investing.*

**Eric Ball**

301 Mangels Avenue  
San Francisco, CA 94127  
TEL: 415.743.1003

*Investment, retirement, and protection  
planning for the LGBT community.*

**Angela Faye Berry**

Financial Advisor  
Merrill Lynch  
1111 Broadway, 22nd Floor  
Oakland, CA 94607  
TEL: 510.208.3833  
FAX: 510.465.8542  
EMAIL: [angela\\_berry@ml.com](mailto:angela_berry@ml.com)  
WEB: [http://fa.ml.com/angela\\_berry](http://fa.ml.com/angela_berry)

*Financial advisor. Life planner.*

**Gerald Butrimovitz**

Gerald Butrimovitz and Associates  
170 San Fernando Way  
San Francisco, CA 94127  
EMAIL: [moneydoctor@ix.netcom.com](mailto:moneydoctor@ix.netcom.com)

*Gerald Butrimovitz and Associates  
provides money management for  
estates with a minimum of \$2 million  
of investable assets, and retirement  
planning and conservative asset  
allocation strategies.*

**Jeff Chow**

Morgan Stanley  
One Kaiser Plaza, Suite 900  
Oakland, CA 94612  
TEL: 800.755.1579 or  
510.891.5207  
FAX: 510.891.0578  
EMAIL: [jeffrey\\_chow@morganstanley.com](mailto:jeffrey_chow@morganstanley.com)

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and comprehensive approach to helping  
you manage your wealth—and help you  
reach your unique destination.*

**Victoria Clarke**

Bruce A. Frankel, CSA, MBA  
Stephen G. Daugherty, EA  
Andrew A. Zittell, CLU, RFC  
Yerba Buena Financial Partners, LLC  
2533 Ocean Avenue, Suite 201  
San Francisco, CA 94132  
TEL: 415.337.8000  
FAX: 415.334.8500  
EMAIL: victoria.clarke@ybfpc.com  
WEB: www.ybfpc.com

*Yerba Buena Financial Partners, LLC is a fee-based, independent, comprehensive financial planning and investment management firm catering to a select personal and business clientele. Services include investment advisory services, personal and business insurance planning, estate planning, college planning, tax planning, and customized retirement plan designs for owners of small- and medium-sized businesses.*

**Michael Cullen**

Cullen Financial Services  
90 New Montgomery Street, Suite 1020  
San Francisco, CA 94105  
TEL: 415.344.9638  
FAX: 415.951.4654  
EMAIL: michaelcullen@cullenfinancial.com

*Cullen Financial Advisors focuses on wealth management, financial plans, investment, and insurance needs.*

**Steve Cutshall, CFP, ChFC**

Lic. #0C97921  
Sagemark Consulting/  
Lincoln Financial Advisors  
2105 South Bascom Avenue, Suite 225  
Campbell, CA 95008  
TEL: 650.863.6055  
EMAIL: steve.cutshall@lfg.com  
WEB: www.lfa-sagemark.com

*The mission of Steve's practice is to help his clients make smart decisions through the financial and estate planning process while helping to grow, protect, and preserve their estates through generations.*

**Rattan Dodeja**

Financial Consultant  
Smith-Barney  
555 California Street, 35th Floor  
San Francisco, CA 94104  
TEL: 415.955.1569  
EMAIL: rattan.k.dodeja@smithbarney.com

*Financial consultant; licenses in the areas of investments, insurance, and managed futures.*

**Bob Dreizler**

Bob Dreizler Chartered Financial Consultant  
2012 H Street, Suite 200  
Sacramento, CA 95814  
TEL: 916.444.2233  
FAX: 916.444.3540  
EMAIL: bdreizler@protectedinvestors.com  
WEB: www.bobdreizler.com

*Bob Dreizler offers financial and tax consulting and money management in socially conscious investing.*

**Christian Edvardsen**

Goldman, Sachs & Co.  
555 California Street, 44th Floor  
San Francisco, CA 94107  
TEL: 415.834.7957  
FAX: 212.256.4913  
EMAIL: christian.edvardsen@gs.com  
WEB: www.gs.com

**Nancy Epstein, CFP**

Protected Investors of America  
235 Montgomery Street, Suite 1050  
San Francisco, CA 94104  
TEL: 415.398.4363 x5974  
FAX: 415.398.6789  
EMAIL: nepstein@protectedinvestors.com

*Nancy Epstein provides independent investment advisory and financial planning services to individuals, organizations, and traditional and non-traditional families seeking financial security reflective of their circumstances, goals, and social/political concerns.*

**James A. “Jim” Frazin, CFP**

First Affirmative Financial Network, LLC  
PO Box 78261  
San Francisco, CA 94107  
TEL: 415.337.4566  
FAX: 415.337.4566  
EMAIL: jf@shibboleth.com

*Jim Frazin is a fee-only Certified Financial Planning professional and Accredited Investment Fiduciary who offers a wide range of financial planning services that help you to reach your dreams and goals using the resources you have. He is a member of the Garrett Financial Planning Network, a national network of fee-only, hourly planners serving the middle-market ([www.garrettplanningnetwork.com](http://www.garrettplanningnetwork.com)). Jim is also an Investment Advisory Representative of First Affirmative Financial Network, LLC, an independent investment advisory firm registered with the Securities Exchange Commission ([www.firstaffirmative.com](http://www.firstaffirmative.com)). (The Garrett Financial Planning Network is neither an affiliate nor subsidiary of First Affirmative Financial Network.)*

**Ron Freund, CFS**

Social Equity Group, FWG  
2550 Ninth Street, Suite 204A  
Berkeley, CA 94710  
TEL: 510.644.9486  
FAX: 510.644.9487  
EMAIL: ron@socialequality.com

*Ron Freund offers socially responsible investment advisory and college and retirement plan services, specializing in individuals, new investors, small businesses, religious communities, and nonprofits. He encourages new investors.*

**Douglas K. Gapper**

Managing Director  
Bear Stearns & Co.  
One Sansome Street, 40th Floor  
San Francisco, CA 94104  
TEL: 415.772.2987  
FAX: 415.249.6411  
EMAIL: gapper@bear.com

*Douglas focuses on global wealth management, specializing in overall strategic asset allocation with in-depth knowledge of fixed income and derivative investments.*

**Ferdinand Garcia**

Woodbury Financial  
2000 Curl Canyon Place, Suite 185  
San Ramon, CA 94583  
TEL: 415.255.6493  
FAX: 925.983.0060  
EMAIL: fgarcia@woodburyfinancial.net

**Jotham Tezare Gebru**

Morgan Stanley  
101 California Street  
San Francisco, CA 94111  
TEL: 415.693.6295  
FAX: 415.693.7113  
EMAIL: jotham.gebru@morganstanley.com

*To empower and enable individuals and businesses in generating planning and fulfilling their financial goals.*

**Dipti Ghosh**

Account Vice President  
UBS Financial Services  
One California Street, 20th Floor  
San Francisco, CA 94114  
TEL: 415.954.6849  
FAX: 415.954.5913  
EMAIL: dipti.ghosh@ubs.com

*Dipti Ghosh is a Financial Advisor with UBS Financial Services in San Francisco. For the past 18 years she has been advising high net worth individuals and organizations on a wide range of financial services, including portfolio management, estate and retirement planning, equity risk management, lending, and capital preservation strategies.*

**John J. Girton, CFA**

Girton Capitol Management  
7 La Rosa Way  
Larkspur, CA 94939  
TEL: 415.927.4484  
FAX: 415.927.4486  
EMAIL: jjgirton@girtoncapital.com  
WEB: www.girtoncapitol.com

*Girton Capital Management is a research-oriented investment advisor, working to achieve our clients' socially responsible investment goals through clear and open communication and friendly professional service.*

**C. Sue Gynn, CFP**

Certified Financial Planner  
CSG Financial/Progressive Asset  
Management  
239 Brannan Street #2A  
San Francisco, CA 94107  
TEL: 415.215.6715  
FAX: 415.978.2682  
EMAIL: csuegynn@yahoo.com

*Fee-based investment management and  
financial planning.*

**Milo F. Hanke, CFP**

Hanke & Co. Wealth Management  
100 Bush Street, Suite 1675  
San Francisco, CA 94104-3943  
TEL: 415.781.6300  
FAX: 415.781.6301  
EMAIL: milo@hankewealth.com  
WEB: www.hankewealth.com

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**John Harrington**

Harrington Investments, Inc.  
1001 2nd Street, Suite 325  
Napa, CA 94559  
TEL: 800.788.0154  
FAX: 707.257.7923  
EMAIL: harrinv@napanet.net  
WEB: www.harringtoninvestments.com

*John Harrington provides highly  
personalized asset management services  
that reflect a commitment to superior  
financial results consistent with positive  
environmental, ethical, and social  
change.*

**David J. Harris**

Legacy Solutions  
355 Gemma Circle  
Santa Rosa, CA 95404  
TEL: 707.539.0241  
FAX: 877.727.6172  
EMAIL: davidharris@legacysolutions.net  
WEB: www.legacysolutions.net

*David Harris provides a tailored process  
for clarifying personal values and  
financial goals that reflect each client's  
unique situation and for designing a  
sound financial strategy consistent with  
the client's personal goals.*

**Forrest Hill, PhD**

The Camejo Group  
520 Third Street, Suite 201  
Oakland, CA 94607  
TEL: 510.587.0800  
FAX: 510.587.0790  
EMAIL: fhill@fwg.com  
WEB: www.camejogroup.com

*We are one of the leading offices in the network of financial professionals offering socially responsible investment services for economic, social, and environmental transformation.*

**Susan M. Hirsch**

Hirsch & Associates  
1714 Stockton Street, Suite 400  
San Francisco, CA 94133-2930  
TEL: 415.837.5408  
FAX: 415.837.5409  
EMAIL: susan@hirschassoc.com

*Hirsch and Associates helps donors make the most of their philanthropic investments, working with families and foundations on a variety of issues ranging from stewardship and succession to establishing a program focus.*

**Jill Hollander, CFP**

Financial Connections  
2608 Ninth Street #302  
Berkeley, CA 94710  
TEL: 510.849.4667

790 Mission Avenue  
San Rafael, CA 94901  
TEL: 415.456.9600  
EMAIL: Jill@FinancialConnections.com  
WEB: www.FinancialConnections.com

*A fee-only financial services company whose mission is to help our clients integrate their values and image of the future with their financial resources.*

**Dan Joraanstad**

First Vice President—Investments  
Wachovia Securities  
555 California Street #2300  
San Francisco, CA 94104-1502  
TEL: 415.395.2508  
FAX: 415.291.8657  
EMAIL: daniel.joraanstad@wachoviasec.com  
WEB: www.wachoviasec.com

*Dan Joraanstad delivers comprehensive financial planning and investment services to help individuals and families achieve short- and long-term goals, with a retirement planning specialty.*

**Joanne F. Jordan, CFP**

Financial Advisor

Alberda, Jordan, Miller & Associates

A Financial Practice of Ameriprise

Financial Services

44 Montgomery Street, Suite 4210

San Francisco, CA 94104

TEL: 415.623.2450

FAX: 415.392.0967

EMAIL: joanne.f.jordan@ampf.com

WEB: [www.ameripriseadvisors.com/  
joanne.f.jordan](http://www.ameripriseadvisors.com/joanne.f.jordan)

*Specializes in personal financial planning, including planning for retirement, estate preservation, risk protection, tax management strategies, and investment advice.*

**Madison Kilpatrick, III CFP**

Morgan Stanley

101 California Street, 3rd Floor

San Francisco, CA 94111

TEL: 415.693.6264

FAX: 415.693.7113

EMAIL: [madison.kilpatrick@  
morganstanley.com](mailto:madison.kilpatrick@morganstanley.com)

WEB: [www.morganstanley.com](http://www.morganstanley.com)

*Madison is a Certified Financial Planner and Financial Advisor specializing in educationally oriented, custom planning solutions for many multigenerational families. In addition to wealth and risk management for affluent families of all types, Kilpatrick also aids foundations and companies with fiduciary guidance, investment, and retirement plan management.*

**Michael Leeder, CFM**

Merrill Lynch

600 California Street, Floor 8

San Francisco, CA 94108

TEL: 415.955.3773

EMAIL: [michael\\_leeder@ml.com](mailto:michael_leeder@ml.com)

**Nolan Madson**

Madson Advisors  
61 Germania Street  
San Francisco, CA 94117-3519  
TEL: 415.626.9023  
FAX: 415.621.2789  
EMAIL: nolanmadson@yahoo.com  
WEB: www.madsonadvisors.com

*Nolan Madson helps clients define their life goals and identify ways to use their financial resources to reach those goals without selling products or taking commissions. He specializes in retirement planning and socially responsible investments.*

**Marianne Malveaux, Esq., MBA, CFA**

*See listing under Estate Planning Attorneys*

**Ian McLeod**

Social Equity Group  
2550 9th Street, Suite 204A  
Berkeley, CA 94710  
TEL: 510.644.9485  
FAX: 415.644.9487  
EMAIL: ian@socialequity.com  
WEB: www.socialequity.com

*Friendly, accessible, and knowledgeable investment advisor representative, specializing in socially responsible investing and financial planning for new and experienced investors.*

**Duncan Meaney**

Social Equity Group  
2550 9th Street, Suite 204A  
Berkeley, CA 9471  
TEL: 510.644.9484  
FAX: 510.644.9487  
EMAIL: duncan@socialequity.com  
WEB: www.socialequity.com

*Duncan Meaney is the president and portfolio manager at the Social Equity Group, working with individuals and organizations managing their security portfolio on a fee basis.*

**Brandon J. Miller, CFP, CLU**

Alberda, Jordan, Miller & Associates  
A Financial Advisory Practice of  
Ameriprise Financial Services, Inc.  
44 Montgomery Street, Suite 4210  
San Francisco, CA 94104  
TEL: 415.623.2450  
FAX: 415.392.0967  
EMAIL: brandon.j.miller@ampf.com  
WEB: www.ameripriseadvisors.com/  
brandon.j.miller

*Brandon Miller provides comprehensive fee-based financial planning to help individuals achieve their financial goals.*

**Steven M. Minkoff**

Minkoff & Associates  
A Financial Advisory Practice of  
Ameriprise Financial Services, Inc.  
111 Pine Street, Suite 1750  
San Francisco, CA 94111  
TEL: 415.391.7700  
FAX: 415.7701  
EMAIL: [steven.m.minkoff@ampf.com](mailto:steven.m.minkoff@ampf.com)  
WEB: [www.ameripriseadvisors.com/  
steven.m.minkoff](http://www.ameripriseadvisors.com/steven.m.minkoff)

*Minkoff & Associates, an Ameriprise Platinum Financial Services practice, specializes in comprehensive personal financial planning for retirement, investments, risk protection, estate planning, and charitable giving strategies; licensed to do business with US residents only in the states of CA, CO, CT, FL, IL, NJ, OH, OR, TX, VA , and WA.*

**Rick Mordesovich**

Sr. Vice President, Private Asset  
Management  
Neuberger/Berman  
555 California Street, 41st Floor  
San Francisco, CA 94104  
TEL: 415.249.8009  
EMAIL: [rmordeso@nb.com](mailto:rmordeso@nb.com)  
WEB: [www.nb.com](http://www.nb.com)  
[www.lehman.com](http://www.lehman.com)

*Rick Mordesovich is a Senior Vice President with Neuberger Berman/Lehman Brothers, responsible for advising individuals, families, and their foundations on asset management, asset protection, philanthropic initiatives, risk budgeting, and wealth transfer strategies. His practice centers on building sustainable business relationships rooted in integrity through values-based planning and socially responsive investing.*

**Daniel Neumann, CFA**

Neuman Capital Management  
520 S. El Camino Real, Suite 710  
San Mateo, CA 94402-1747  
TEL: 650.548.9200 x103  
FAX: 650.548.9209  
EMAIL: dan@neumanncapital.com  
WEB: www.neumanncapital.com

*Neumann Capital Management has been serving the LGBT community since 1990, providing an integrated approach to the management of wealth for individuals and couples.*

**Dennis Nix**

Mass Mutual Financial Group  
250 Montgomery Street #200  
San Francisco, CA 94104  
TEL: 415.743.1003  
FAX: 415.956.2704  
EMAIL: dnix@finsvcs.com

*Investment, retirement, and protection planning for the LGBT community.*

**Evan Oliver, CFA**

Verity Wealth Advisors, LLC  
220 Halleck Street, Suite 120A  
San Francisco, CA 94129-0504  
TEL: 415.561.3340  
FAX: 415.561.3344  
EMAIL: evan@veritywealth.com  
TEL: www.veritywealth.com

*Verity Wealth Advisor delivers financial planning and investment management guidance to affluent individuals, retirement plans, and foundations.*

**Glenn Perry**

Partner, Bhatia Perry Group  
Merrill Lynch Private Banking Group  
101 California Street, 21st Floor  
San Francisco, CA 94111  
TEL: 415.288.2598  
EMAIL: glenn\_perry@ml.com

*The Bhatia Perry Group provides wealth planning, portfolio management, trust service, and private banking to affluent individuals and families.*

**Peter-Eric Philipp, CFA**

Cambridge Investment Research  
Advisors, Inc. (Registered Investment  
Advisor)

155 Montgomery St, Suite 1001  
San Francisco, CA 94104

TEL: 800.715.0833

TEL: 415.677.9300

FAX: 415.677.9366

EMAIL: Peter@cirsf.com

WEB: www.cirsf.com

*Peter-Eric Phillip is an advisor who has been featured in the San Francisco Chronicle and on television. Peter's advice has helped many LGBT investors reduce their tax bills, preserve their capital, and increase their financial security.*

**Mark Anthony Porter**

Financial Advisor

Ameriprise Financial Services, Inc.  
180 Montgomery Street, Suite 2480  
San Francisco, CA 94104

TEL: 415.743.9886

FAX: 415.288.7337

EMAIL: mark.a.porter@ampf.com

*Comprehensive financial planner*

**Rachel J. Robasciotti**

**Maya Philipson**

Robasciotti & Associates, Inc.  
870 Market Street, Suite 580  
San Francisco, CA 94102

TEL: 415.986.5500

FAX: 415.986.5502

EMAIL: info@robasciotti.com

WEB: www.robasciotti.com

*Robasciotti & Associates offers education-oriented, holistic financial planning, with an emphasis on identifying personal values and building a solid financial foundation in order to attain life goals.*

**Gary E. Roof**

Roof Eidam & Maycock

A Registered Investment Advisor

One Post Street, Suite 2725  
San Francisco, CA 94104

TEL: 415.788.4600

FAX: 415.788.4606

EMAIL: groof@roofeidamaycock.com

WEB: www.roofeidamaycock.com

*Roof, Eidam & Maycock, A Registered Investment Advisor, offers extensive financial planning and asset management services to individuals, corporations, trusts, and foundations.*

**Philip A. Samatra**

Merrill Lynch –  
Global Private Client Group  
600 California Street, 8th Floor  
San Francisco, CA 94108  
TEL: 415.955.3781  
FAX: 415.955.3971  
EMAIL: philip\_samatra@ml.com

*Philip Samatra provides long-term comprehensive financial planning. He looks at where you are today and where you'd like to be, then we develop a step-by-step process on how to reach your goals efficiently.*

**Stephen M. Seewer**

Wells Fargo, Private Client Services  
TEL: 650.348.4513  
WEB: [www.wellsfargo.com/  
investing/pcs/](http://www.wellsfargo.com/investing/pcs/)

*Stephen Seewer provides comprehensive wealth management services, focusing on investment management and brokerage services, and can introduce clients to Wells Fargo's private banking, trust, and financial planning services.*

**Maryann Simpson**

RBC Dain Rauscher  
345 California Street, 29th Floor  
San Francisco, CA 94104  
TEL: 866.408.2658  
FAX: 415.445.8313  
EMAIL: [maryann.simpson@rbcdain.com](mailto:maryann.simpson@rbcdain.com)  
WEB: [www.rbcdain.com](http://www.rbcdain.com)

*Maryann Simpson assists individuals and institutions to reflect their values in their investments through long-term financial strategies, customized screening, and shareholder advocacy.*

**Thomas W. Swift**

Financial Avengers, Inc.  
235 Montgomery Street, Suite 747  
San Francisco, CA 94104  
TEL: 415.773.2174  
FAX: 415.773.2194  
EMAIL: [avengers@financialavengers.com](mailto:avengers@financialavengers.com)  
WEB: [www.financialavengers.com](http://www.financialavengers.com)

*Financial Avengers is a gay-owned registered investment advisor, providing financial planning, retirement planning, estate planning, and investment management services.*

**Barry R. Taylor, CFP**

Portfolio Manager  
 Bingham, Osborn & Scarborough, LLC  
 345 California Street, Suite 1100  
 San Francisco, CA 94104  
 TEL: 415.781.8535  
 FAX: 415.291.9575  
 EMAIL: barry.taylor@bosinvest.com  
 WEB: www.bosinvest.com

*Bingham, Osborn & Scarborough is a comprehensive wealth management firm offering financial planning and investment management services to private and institutional clients, including nonprofit organizations. Barry Taylor is a certified financial planning professional and serves on the board of directors of the Financial Planning Association.*

**Jean S. Terauds**

Oppenheimer and Co.  
 580 California Street, Suite 2300  
 San Francisco, CA 94104  
 TEL: 415.438.2979  
 FAX: 415.438.2985  
 EMAIL: jean.terauds@opco.com  
 WEB: www.opco.com

*As a team, Jeff Ahrens and Jean Terauds use a consultative approach to financial asset management, helping clients identify their financial needs and assisting them in finding suitable solutions. Their goal is to help clients understand their financial position, have confidence in their investment decisions, and feel optimistic about their future.*

**Lisa Tracy**

Coach and Philanthropic Advisor  
 Philanthropy Vision  
 383 61st Street  
 Oakland, CA 94618  
 TEL: 510.548.1606  
 TEL: 877.839.9292  
 EMAIL: lisa@philanthropyvision.com

*Lisa Tracy is a philanthropy coach. She is one of a handful of financial planners nationally who specialize in philanthropic planning. She helps individuals rearrange their estates so they can give more money away and pay fewer taxes. She also has a coaching business, helping people to create radical change in the world with their money and talents.*

**Stephanie E. Trapasso**

Financial Planning Specialist and  
Financial Advisor  
Smith Barney Private Client Group  
1001 Page Mill Road, Building #4,  
Suite 101  
Palo Alto, CA 94304  
TEL: 650.856.4536  
FAX: 650.493.6647  
EMAIL: stephanie.e.trapasso@  
smithbarney.com  
WEB: www.fa.smithbarney.com/  
trapasso

*Stephanie Trapasso is an investment specialist and financial planner; she manages discretionary assets for private individuals and families with assets of 5 million dollars or more.*

**Alison Wise**

Progressive Asset Management  
520 3rd Street, Suite 204  
Oakland, CA 94607-3505  
TEL: 510.622.0202  
FAX: 510.287.2419  
EMAIL: awise@fwg.com

*Progressive Asset Management is a national network of investment consultants specializing in socially responsible investments since 1987.*

**Catherine Woodman**

Protected Investors of America  
900 Colusa Avenue, Suite 203  
Berkeley, CA 94707-2321  
TEL: 510.528.5823  
FAX: 510.892.2991  
EMAIL: cwoodman@  
protectedinvestors.com  
WEB: www.protectedinvestors.com

*Catherine Woodman works with socially conscious investors to integrate their values with their financial goals.*

## Accountants

**Ellen Abel**

Ellen Abel, CPA  
125 Encline Court  
San Francisco, CA 94127  
TEL: 415.469.9100  
FAX: 415.469.9180  
EMAIL: ellen@cpabel.com

*Tax preparation and planning*

**Barbara M. Beery**

*See listing under Estate Planning Attorneys*

**Michael C. Berg, CPA**

Pohl, McNabola, Berg & Company  
50 Francisco Street, Suite 120  
San Francisco, CA 94133  
TEL: 415.399.1330  
FAX: 415.399.9212  
EMAIL: mike@pmbcpas.com  
WEB: www.pmbcpas.com

*Pohl, Manavola, Berg & Company is a certified public accounting firm that specializes in audit, tax, and estate services.*

**Robert R. Harman II**

Regional AERS Senior Manager  
Deloitte Services, LLP  
50 Fremont Street  
San Francisco, CA 94105  
TEL: 415.783.5275  
EMAIL: rharminii@deloitte.com  
WEB: www.deloitte.com

*Income tax planning and compliance for high net worth individuals and closely held businesses.*

**Pan Haskins**

6778 Paso Robles Drive  
Oakland, CA 94611  
TEL: 510.339.3003  
FAX: 510.339.3004  
EMAIL: panhaskins@sbcglobal.net  
WEB: www.panhaskins.com

*Providing tax consultation and tax preparation services for estates, trusts, and individuals.*

**Kris Hill**

Senior Manager  
Deloitte Tax, LLP  
50 Fremont Street, Suite 3100  
San Francisco, CA 94105  
TEL: 415.783.4948  
FAX: 415.783.9231  
EMAIL: krhill@deloitte.com  
WEB: www.deloitte.com

*Income tax planning and compliance for high net worth individuals and closely held businesses.*

**Chris Kollaja**

A. L. Nella Company  
1390 Market Street, Suite 1004  
San Francisco, CA 94117  
TEL: 415.621.2424  
EMAIL: ckollaja@alnella.com  
WEB: www.alnella.com/advisors/  
alnellacpa/

**William Langley**

Deloitte, LLP  
 50 Fremont Street, Suite 3100  
 San Francisco, CA 94105  
 TEL: 415.783.4458  
 FAX: 415.783.9231  
 EMAIL: wlangley@deloitte.com  
 WEB: www.deloitte.com

*Income tax planning and compliance for high net worth individuals and closely held businesses.*

**Marianne Malveaux**

*See listing under Estate Planning Attorneys*

**Nanette Lee Miller**

CPA & Partner  
 Stonefield Josephson, Inc.  
 101 Montgomery Street, Suite 1900  
 San Francisco, CA 94104  
 TEL: 415.981.9400  
 EMAIL: nmiller@sjaccounting.com  
 WEB: www.sjaccounting.com

*Stonefield Josephson, Inc. provides comprehensive individual and estate tax planning and compliance tax services for high net worth individuals.*

**Arlene K. Mose, CPA**

367 Civic Drive, Suite 12  
 Pleasant Hill, CA 94523  
 TEL: 925.680.0110  
 FAX: 925.680.0108  
 EMAIL: taxcrazy@earthlink.net  
 WEB: www.taxcrazy.com

**Stan Pollock**

Pollock & Associates  
 612 Howard Street #200  
 San Francisco, CA 94105  
 TEL: 415.424.6880  
 FAX: 707.222.2510  
 EMAIL: stan@scpcpa.biz  
 WEB: www.scpcpa.biz

*California CPA, Certificate in Estate Planning*

**Lawrence Pon, CPA/PES, CFP**

Certified Public Accountant  
 Pon & Associates  
 240F Twin Dolphin Drive  
 Redwood City, CA 94605  
 TEL: 650.508.1268  
 FAX: 650.508.1233  
 EMAIL: lkypon@aol.com

**Leonard Stec**

Stec & Berkman  
832 Folsom Street, Suite 1000  
San Francisco, CA 94107  
TEL: 415.292.3323

**Karen Stogdill, CEBS, EA**

Tax Practice of Karen K. Stogdill  
1563 Solano Avenue #367  
Berkeley, CA 94707  
TEL: 510.526.7630  
FAX: 510.526.7631  
EMAIL: kksgeneral@hotmail.com

*Providing tax consultations, planning,  
and preparation for individuals, couples,  
and small businesses.*

**Randy Zamarra**

Wertheimer Dress & Co., CPAs  
595 Market Street, Suite 1450  
San Francisco, CA 94114  
TEL: 415.781.2500  
FAX: 415.982.1121  
EMAIL: rzamarra@wd.cpas.com  
WEB: www.wd.cpas.com

*Wertheimer Dress provides sophisticated  
tax planning strategies, tax preparation  
services, IRS problem resolution  
services, and estate and trust services.*

**Jan Zobel**

Jan Zobel EA Tax Services  
3045 Holyrood Drive  
Oakland, CA 94611  
TEL: 510.482.1015  
FAX: 510.482.1015  
EMAIL: Jan@JanZtax.com  
WEB: www.JanZtax.com

*Since 1978, Jan Zobel has provided  
careful, friendly, and knowledgeable  
tax preparation and consultations for  
self-employed people (including  
independent contractors), owners of  
rental property, and domestic partners.*

Adoption  
and  
Domestic  
Relations

**David Alexander**

*See listing under Estate Planning Attorneys*

**Alexsis Beach**

Rachel Lederman and Alexsis C. Beach,  
Attorneys at Law  
558 Capp Street  
San Francisco, CA 94110  
TEL: 415.282.9300  
FAX: 415.285.5066  
EMAIL: acbeach@2momslaw.com  
WEB: www.2momslaw.com

*The law offices of Rachel Lederman and Alexsis Beach specialize in tenants' rights, queer adoptions, personal injuries, and bankruptcy.*

**Emily Doskow**

Attorney at Law  
1010 Grayson Street, Suite 2  
Berkeley, CA 94710  
TEL: 510.540.8311  
FAX: 510.644.1511  
EMAIL: doskesq@aol.com  
WEB: www.emilydoskow.com

*Emily Doskow provides family law counsel to the LGBT community, including all types of adoption, domestic partnership formation and dissolution, and other matters relating to parentage and family.*

**Rachel Ginsburg**

Law Offices of Rachel Ginsburg  
1970 Broadway, Suite 1200  
Oakland, CA 94612  
TEL: 510.835.5568  
FAX: 510.835.5310  
EMAIL: rdginsburg@aol.com

*Rachel Ginsburg provides legal representation in family law for both domestic partnership and marriage relationship, including dissolution, child custody and support, adoptions, wills, powers of attorney, and partnering agreements.*

**Frederick Hertz**

Law Offices of Fredrick Hertz  
1970 Broadway, Suite 1200  
Oakland, CA 94612  
TEL: 510.834.4114  
FAX: 510.451.4115  
EMAIL: fred@frederickhertz.com  
WEB: www.samesexlaw.com

*Legal counseling, advocacy, and mediation services for same-sex couples, both in the formation and dissolution of those relationships.*

**Eva Herzer**

Mediation Law Offices  
901 Peralta Avenue  
Albany, CA 94706  
TEL: 510.526.5144  
EMAIL: eva@igc.org

*Eva Herzer mediates the dissolution of domestic partnerships, drafts property and domestic partnership agreements, and provides counsel regarding the registration of domestic partnerships and adoptions. She also prepares wills and powers of attorney.*

**Elizabeth D. "B.X." Long**

Law Office of Elizabeth D. Long  
345 Franklin Street  
San Francisco, CA 94102  
TEL: 415.431.9315  
EMAIL: bxlong@bxlonglaw.com  
WEB: www.bxlonglaw.com

*BX Long is an attorney and mediator who offers services related to a broad range of family and domestic partnership concerns, including assistance with living together or splitting up disputes; assistance with child custody, visitation, and support; wills, trusts, and powers of attorney; conservatorships and probates.*

**Diane Michaelsen**

Law Offices of Diane Michaelsen  
3190 Old Tunnel Road  
Lafayette, CA 94549  
TEL: 925.945.1880  
FAX: 925.933.6807  
EMAIL: [diane@lodm.com](mailto:diane@lodm.com)  
WEB: [www.familyformation.com](http://www.familyformation.com)

*The Law Offices of Diane Michelsen specialize in adoption, assisted reproduction law, surrogacy, and ovum donation.*

**Andrea L. Palash**

Pierson Coats & Palash, LLP  
685 Market Street, Suite 370  
San Francisco, CA 94105  
TEL: 415.495.4499  
FAX: 415.495.3202  
EMAIL: [apalash@pcplaw.com](mailto:apalash@pcplaw.com)

*Andrea Palash is dedicated exclusively to family law, with an emphasis on contested child custody litigation.*

**Ora S. Prochovnick**

Law Offices of Ora S. Prochovnick  
50 Fell Street  
San Francisco, CA 94102  
TEL: 415.241.1317  
FAX: 415.861.7566  
EMAIL: [orap@newcollege.edu](mailto:orap@newcollege.edu)

*Ora Prochovnick has specialized for over 20 years in tenants' rights and LGBT family protection, including adoptions, relationship agreements, wills and estate planning, and mediation services. Sliding scale fees.*

**Charles Spiegel**

Stein & Lubin LLP  
600 Montgomery Street, 14th Floor  
San Francisco, CA 94114  
TEL: 415.955.5073  
FAX: 415.981.4343  
EMAIL: [cspiegel@steinlubin.com](mailto:cspiegel@steinlubin.com)  
WEB: [www.steinlubin.com](http://www.steinlubin.com)

*Charlie Spiegel is a seasoned attorney and activist in the LGBT community parenting movement (former ED of Our Family Coalition, adoptive parent) and civil rights (former Board Co-Chair, Lambda Legal) whose practice focuses on adoptions and other family formation, including by LGBT parents.*

**Paul Thorndal**

The Wald Law Group, APC  
One Bush Street, Suite 1150  
San Francisco, CA 94104  
TEL: 415.399.1840  
FAX: 415.648.3098  
EMAIL: paul@waldlaw.net  
WEB: www.waldlaw.net

*Paul Thorndal is a senior litigation and appellate attorney with a focus on divorce and/or dissolution of domestic partnerships and traditional marriages involving both custody disputes and division of financial assets, as well as contested parentage actions.*

**Deborah Wald**

The Wald Law Group, APC  
One Bush Street, Suite 1150  
San Francisco, CA 94104  
TEL: 415.648.3097  
FAX: 415.648.3098  
EMAIL: info@waldlaw.net  
WEB: www.waldlaw.net

*Deborah Wald has over 12 years' experience representing LGBT families, including family formation and adoption law, donor and co-parenting agreements, simple wills, name changes, domestic partnership agreements, divorce, dissolution, and contested parentage actions. Sliding scale for adoptions.*

## Fiduciaries

**Michael C. Berg, CPA**

*See listing under Accountants*

**Elizabeth W. Callaway**

PO Box 18794

Oakland, CA 94619

TEL: 510.530.1720

FAX: 510.530.1720

EMAIL: elizcall@earthlink.net

*Elizabeth Callaway is a private fiduciary, a caring and experienced professional who uses her clients' written instructions to manage their affairs when they are overseas, ill, or disabled, and to settle their estates.*

**Edith Davidson**

PO Box 159

San Leandro, CA 94577

TEL: 510.351.2609

FAX: 510.351.8609

**Scott R. Hodges**

TEL: 415.923.1116

**David Jonson**

Coming Home Fiduciary Services  
825 Van Ness Avenue, Suite 604  
San Francisco, CA 94109  
TEL: 415.474.2250  
FAX: 415.474.2227  
EMAIL: comehome@sonic.net  
WEB: www.cominghomefiduciary.org

*Coming Home is a nonprofit agency providing professional fiduciary services as conservator, attorney-in-fact, representative payee, trustee, and executor/administrator of estate.*

**Madison Kilpatrick, III CFP**

*See listing under Financial Advisors*

**Rick Levy**

Coming Home Fiduciary Services  
825 Van Ness Avenue, Suite 604  
San Francisco, CA 94109  
TEL: 415.474.2250  
FAX: 415.474.2227  
EMAIL: comehome@sonic.net  
WEB: www.cominghomefiduciary.org

*Coming Home is a nonprofit agency providing professional fiduciary services as conservator, attorney-in-fact, representative payee, trustee, and executor/administrator of estate.*

**Thomas Lucas, MSW, LCSW**

Thomas A. Lucas & Associates  
PO Box 14040  
San Francisco, CA 94114  
TEL: 415.552.2042  
FAX: 415.358.4119  
EMAIL: penrose65@aol.com

*Tom Lucas provides fiduciary services as a conservator, attorney-in-fact, trustee, and executor/administrator of estate. In addition, as a professional social worker, he works privately with older adults and their families to create a plan of care that meets the needs of the older adult.*

**Marianne Malveaux**

*See listing under Estate Planning Attorneys*

**Scott S.H. Phipps**

Phisco Senior Services  
366 Grand Avenue #233  
Oakland, CA 94610  
TEL: 510.508.9588  
FAX: 510.444.1682  
EMAIL: phisco2@yahoo.com  
WEB: www.phiscoseniorservices.com

*Scott Phipps serves as a fiduciary by court appointment as a conservator, trustee, as well as guardian or personal representative of an estate.*

## Useful Websites and Organizations

### **Horizons Foundation**

[www.horizonsfoundation.org](http://www.horizonsfoundation.org)  
415.398.2333

In addition to this *Directory of Professional Advisors*, Horizons Foundation produces a *Guide to Gift Planning for the LGBT Community*, advanced philanthropic directive forms, LGBT Community Endowment options, and other materials that may be useful for both donors and professional advisors.

### **Lambda Legal Defense and Education Fund**

[www.lambdalegal.org](http://www.lambdalegal.org)

Lambda's website contains many short articles containing useful information, such as *What Are You Waiting For?* *Write a Will!* and *Suggested Questions to Ask an Attorney*. They also have a booklet entitled *Life Planning: Legal Documents & Protections for Lesbians and Gay Men* available for download.

**National Center for Lesbian Rights**

[www.nclrights.org](http://www.nclrights.org)

NCLR's website has many downloadable fact sheets, articles, and sample documents covering partnership protection, adoption, and other family issues, including *LifeLines: Documents to Protect You and Your Family in Times of Trouble*, sample co-parenting agreements, donor insemination agreements, and many others. NCLR's site also walks you through how to register your California domestic partnership.

**Nolo Press**

[www.nolo.com](http://www.nolo.com)

Nolo's mission is to make the legal system work for everyone, not just lawyers. Their website has both articles and products for purchase that enable people to prepare their legal documents as much as possible by themselves. They have resources on wills, healthcare, powers of attorney, estate planning, and more, including regular updates to their *Legal Guide for Lesbian and Gay Couples*. Nolo's publications and products also include *Nolo's Simple Will Book*, *Plan Your Estate*, and *Quicken Willmaker Plus*.

**Bay Area Jewish Healing Center,  
a program of Institute On Aging**

[www.jewishhealingcenter.org](http://www.jewishhealingcenter.org)

Their free *Five Wishes Living Will Booklet* helps you express how you want to be treated if you are seriously ill and unable to speak for yourself. It is an easy-to-use legal document, and is unique among other living will and health agent forms because it looks to all of a person's needs: medical, personal, emotional, and spiritual. The *Five Wishes* document includes easy-to-complete living will and durable power of attorney for healthcare forms (also known as an advance directive).

*Cinco Deseos*, the Spanish version, is also available. To receive a free copy, call 415.750.4111.

**Partnership for Caring**

[www.partnershipforcaring.org](http://www.partnershipforcaring.org)

This site has living wills and healthcare proxy forms available for download.

**Register a California domestic  
partnership**

[www.ss.ca.gov/dpregistry/](http://www.ss.ca.gov/dpregistry/)





## horizons foundation

870 Market Street, Suite 728

San Francisco, CA 94102

(t) 415.398.2333

(f) 415.398.4733

(w) [www.horizonsfoundation.org](http://www.horizonsfoundation.org)