



2010

Directory of Professional Advisors for the LGBT Community

30
YEARS

horizons foundation

YOUR LGBT COMMUNITY | YOUR LGBT FOUNDATION



Donor-Advised Funds at Horizons Foundation



Enjoy simple, comprehensive administration of your philanthropic giving. A single contribution to your donor-advised fund at Horizons Foundation can benefit multiple nonprofits while requiring only one tax substantiation letter and no check-writing on your part. Join the community.



Become part of a community of givers

For more information on donor-advised funds, contact Deb Stallings at 415.398.2333 or dstallings@horizonsfoundation.org

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If you know of other advisors who should be listed in this directory, please contact Devesh Khata at 415.398.2333 or visit our website at www.horizonsfoundation.org to download the appropriate forms.

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About This Directory

Horizons Foundation is proud to present the 2010 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 (LGBT) 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.

Because part of Horizons Foundation's mission is to increase LGBT philanthropy, we also asked advisors for information on how they give back to the Bay Area LGBT community. We have highlighted in **BOLD CAPS** those who let us know that they support local LGBT organizations through board service or significant personal donations, or who promote LGBT philanthropy through client referrals to Horizons Foundation.

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 a series of seminars on topics related to LGBT giving, 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.

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 30 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. The foundation has made more than \$4 million in grants to nonprofit organizations in the past two years alone.

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 Deb Stallings, Director of Development and Gift Planning, 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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If We All Leave Something, Anything is Possible



Find out how a gift in your will or estate plan can make a difference in the LGBT community for generations to come. Contact us at 415.398.2333 or dstallings@horizonsfoundation.org

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Estate Planning Attorneys

Names in **BOLD CAPITALS** indicate advisors who give back to local LGBT organizations through board service or significant personal donations, or who promote LGBT philanthropy through client referrals to Horizons Foundation.

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Judith Baer has over 32 years of legal experience specializing in estate planning services, including wills and trusts, as well as estate administration services, including probate and trust administration.

***ALMA SOONGI BECK, JD,
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Alma Soongi Beck is a certified specialist in estate planning, trust, and probate law with the State Bar of California Board of Legal Specialization. Her practice focuses on legal services for the LGBT community on issues relating to probate and trust administration, estate planning and will/trust drafting, domestic partnership issues and property tax, titling and co-ownership issues.

***MICHAEL BLACKSBURG**

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The Law Offices of Michael Blacksburg offer general practice legal services with a focus on real estate, business and estate planning.

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Creighton Law Offices specializes in providing exemplary estate planning, trust, probate, and long-term care legal services to members of the LGBT community.

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Danfoura Law Offices is dedicated to providing affordable and responsible legal services to individuals, businesses, and organizations in regards to general civil matters, real property, and estate planning and administration.

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

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The Gadzo Law Firm specializes in preparing wills and revocable living trusts, administering estate and trusts, probating estates, forming family limited partnerships and limited liability companies, corporate structuring, business incorporation, and establishing a wide variety of tax sensitive trusts, including children's trusts, charitable trusts, and irrevocable life insurance trusts.

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Attorney David R. Gellman has been dealing with the unique estate planning needs of LGBT clients for over 30 years, and has also engineered the formation of hundreds of tenancy-in-common groups and condominium conversions in San Francisco.

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Rachel Ginsburg provides legal representation in family law, for both domestic partnership and marriage relationships, including dissolution, child custody and support, adoptions, pre-registration agreements, pre-marital agreements, wills, and powers of attorney.

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Roger Gross has practiced law in the LGBT community since 1974; his practice focuses on estate planning (wills, trusts, and probate) and small business formation and business transactions.

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

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Ellen Kahn specializes in estate planning, with 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.

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Richard J. Lee is an attorney with 35 years of experience specializing in estate planning, probate, elder law, and business transactional matters, including nonprofit corporations. The firm also does probate and trust litigation, and represents conservators and trustees.

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

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Kato, Feder and Suzuki, LLP was established in 1987 and maintains a strong reputation in the Bay Area meeting estate planning and long-term care needs for individuals.

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Heba Nimr serves all kinds of families who are in the midst of or planning for significant transitions, such as co-habitation, relationship formation or dissolution, incapacity, and/or death—to support working towards transforming difficult situations into opportunities for positive strength-building change.

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For 30 years Linda Scaparotti has been dedicated to providing the services, documents, and education needed to protect LGBT relationships and families, specializing in estate planning and family law, including trusts, powers of attorney, domestic partner agreements, adoption, donor, and surrogacy agreements. Cutting edge and caring.

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

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Helene V. Wenzel provides a full spectrum of estate planning solutions for you and your loved ones: wills and trusts; health and financial powers of attorney; probate and trust administration; incapacity and conservatorships; special needs trust; long-term care and MediCal eligibility for nursing home care.

***CARL WOLF**

See listing for Boone Callaway

Financial Advisors

Names in **BOLD CAPITALS** indicate advisors who give back to local LGBT organizations through board service or significant personal donations, or who promote LGBT philanthropy through client referrals to Horizons Foundation.

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Elisabeth Andreason's expertise in asset management, estate planning, and business exit strategies coupled with philanthropic planning allow her to design plans that are a win-win for both family and the community while minimizing tax exposure during the sale or transfer of assets.

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Angela Berry is an energetic financial advisor with over nine years' experience in the financial services industry.

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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.

L. Britt Callaway, MBA

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Britt Callaway is an Accredited Domestic Partnership Advisor (ADPA), a designation indicating Britt's extensive training and testing on the financial challenges faced by domestic partners.

***S. KATHERINE CAMPBELL, CFP**

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North Berkeley Investment Partners provides comprehensive investment management and financial planning services.

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Jeffrey Chow provides personal and comprehensive financial plans with a special focus on risk management and specialties in philanthropy, generating retirement income, and legacy planning.

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Steve Cutshall and his team of specialists work with individuals and closely held businesses to develop customized retirement and business succession solutions to reach their goals. The mission of Steve's fee-based practice is to work with clients throughout the financial and estate planning process; while helping them grow, protect and preserve their estates through generations.

***DANIELLE M. DALEY, CFP**

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Solutions Wealth Management is a holistic personal financial planning firm caring for its clients' financial lives from retirement planning to investments to estate planning, with special care for the needs of LGBT families. Danielle Daley, CFP, is a registered representative with, and offers securities through, LPL Financial (Member FINRA/SIPC).

Stephen G. Daugherty

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Stephen Daugherty provides tax preparation and planning services, as well as bookkeeping, accounting, and fee-only financial planning services for high-net-worth individuals and small businesses.

***RICHARD T. DAVIS**

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Scott Phipps is a CA Licensed Professional Fiduciary #11 acting as conservator, trustee, executor/administrator, and keeping seniors fiscally fit.

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Useful Websites and Organizations

Horizons Foundation

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, testamentary gift forms, LGBT Community Endowment Fund options, and other planned giving materials that may be useful for both donors and professional advisors.

Lambda Legal Defense and Education Fund

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

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 and discusses legal issues around marriage for same-sex couples.

Nolo Press

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

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

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

Tax Information for California Registered Domestic Partners

www.ftb.ca.gov

Download publication 737

Register or terminate a California domestic partnership

www.sos.ca.gov/dpregistry/

A graphic consisting of seven vertical stripes of equal width, each a different color from the rainbow spectrum: red, orange, yellow, green, blue, and purple. The stripes are positioned at the top of the page, above a white semi-circular area.

We're accepting.

Your donation supports many LGBT causes.

Every day, LGBT community nonprofits help meet the needs, advance the rights, and celebrate the lives of LGBT people throughout the Bay Area.

Thanks to the generosity of people like you, Horizons Foundation supported them with more than \$4 million in grants in the last two years alone.

Donate to Horizons Foundation today and help your LGBT community strong.

horizonsfoundation.org



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