

# 2005

**Directory  
of Professional  
Advisors  
for the LGBT  
Community**



**horizons foundation**

# Contents

About this Directory 2

About Horizons Foundation 3

Estate Planning Attorneys 5

Financial Advisors 12

Certified Public Accountants 21

Adoption and Domestic Relations Attorneys 23

Fiduciaries 26

Useful Websites and Organizations 28

*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 2005 edition of its Directory of Professional Advisors. Created in response to the numerous requests for referrals to such advisors that we field, 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.

This directory includes attorneys, financial advisors, accountants, and others who offer services that integrate the needs of LGBT clients. In compiling it, Horizons cast a wide net by requesting hundreds of advisors to return a completed questionnaire describing their services for inclusion here. Included in this directory are only those who returned the questionnaire. This directory is updated annually, and 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 our community's philanthropic values and philanthropic potential. It is our hope that as people engage the services of such advisors, that all parties remain cognizant of the philanthropic dimensions and possibilities of the decisions to be made. Towards that end, we also offer an annual philanthropy series of workshops that are tailored to both the donor community and to professional advisors.

We hope that you find this Directory of Professional Advisors to be useful.

# 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 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 organizations that serve and advocate for our community.

In addition to our multi-faceted support for community organizations, Horizons supports donors, without whose commitment and generosity our community's advocates and service-providers would not exist. Horizons provides philanthropic education programs, tailored services for individual donors, and a 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 as well as to professional advisors to assist their 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 ext. 103.

*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 those listed.*

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

*CFP is a registered trademark of Certified Financial Planner Board of Standards, Inc. All other trademarks are the property of their respective holders.*

# Estate Planning Attorneys

**David J. Alexander**

Law Office of David J. Alexander  
4061 East Castro Valley Blvd. #125  
Castro Valley, CA 94552  
TEL: 510.538.0272  
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 Lauter Baer**

Attorney at Law  
3929 Twenty-Fourth 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 twenty-six years experience.*

**Alma Soongi Beck, Esq.**

The Beck Law Group,  
A Professional Corporation  
101 Howard Street, Suite 490  
San Francisco, CA 94105  
TEL: 415.642.9930  
FAX: 415.593.9951  
EMAIL: alma@becklawgroup.com  
WEB: www.becklawgroup.com

*Alma Soongi Beck, Esq., of the Beck Law Group, PC, represents clients on estate planning and estate and trust administration matters, with a focus on the needs of LGBT people, couples, and families and the unique issues we face relating to domestic partnership, property taxes, federal estate and gift taxes, and other property co-ownership issues.*

**Barbara M. Beery**

Law Office of Barbara M. Beery  
1814 Franklin Street, Suite 630  
Oakland, CA 94612  
TEL: 510.835.2353  
FAX: 510.251.8021  
EMAIL: barbara@beerylaw.com

*Barbara Beery uses careful listening to clients' goals and expert training and skills to design and implement individual estate plans that creatively serve her client's needs, while saving costs, time, and efforts for her clients.*

**Dale Boutiette**

Boutiette + von Herrmann, LLP  
1 Bush Street, Suite 1150  
San Francisco, CA 94104  
TEL: 415.693.0550  
FAX: 415.693.0500  
EMAIL: dale@bvhlaw.com

*Boutiette + von Herrmann, LLP, provides a values-based approach to estate planning, focusing specifically on the needs of the LGBT community.*

**Boone Callaway**

Callaway & Wolf  
785 Market Street, Suite 1150  
San Francisco, CA 94103  
TEL: 415.541.0300  
FAX: 415.777.6262  
EMAIL: boone@att.net

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

**Diane R. Cash**

Law Offices of Diane R. Cash  
1300 Clay Street, Suite 820  
Oakland, CA 94612  
TEL: 510.763.5611  
FAX: 510.763.3430  
EMAIL: dash@sfestateplanner.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 94114  
TEL: 415.986.1060  
FAX: 415.397.1577  
EMAIL: kyle@mjjesq.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.*

**Susanne Cohen**

Law Offices of Susanne B. Cohen  
1010 Grayson Street, Suite 2  
Berkeley, CA 94610  
TEL: 510.540.6333  
FAX: 510.540.6305  
EMAIL: sbcohen@pacbell.net

*Susanne B. 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.*

**Carole Cullum**

Cullum & Sena  
1390 Market Street, Suite 818  
San Francisco, CA 94102  
TEL: 415.863.5300  
FAX: 415.863.8596  
EMAIL: cullumsena@aol.com

*Carole Cullum offers domestic partnership, family law, and estate planning services to the LGBT community.*

**W. Edward Dean**

Dean Yuen Smith, LLP  
555 Montgomery Street, Suite 1210  
San Francisco, CA 94111  
TEL: 415.352.1440  
FAX: 415.352.1441  
EMAIL: edean@deanyuensmith.com

*Income, estate, and charitable tax planning for individuals, families, and businesses.*

**Jill Dodd**

Steeffel, Levitt, and 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 specializes in estate, gift, and planned charitable giving for high net worth individuals and families; in trust and probate administration; and in the representation of fiduciaries and beneficiaries of trusts. She also has a substantial nonprofit practice, representing charities in all aspects of their operations.*

**Erik Dryburgh**

Silk, Adler, and Colvin  
235 Montgomery Street, Suite 1220  
San Francisco, CA 94104  
TEL: 415.421.7555  
FAX: 415.421.0712  
EMAIL: dryburgh@silklaw.com  
WEB: 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**

Goldman, Gellman, Melbostad,  
Gibson & Harris, LLP  
1388 Sutter Street, Suite 1000  
San Francisco, CA 94109  
TEL: 415.673.5600  
FAX: 415.673.5606  
EMAIL: dgellman@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, Esq.**

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.*

**M. Jean Johnston**

M. Jean Johnston, Attorneys at Law  
220 Montgomery Street, 15th Floor  
San Francisco, CA 94114  
TEL: 415.986.1060  
FAX: 415.397.1577  
EMAIL: jean@mjjesq.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.*

**Ellen Kahn**

Sideman & Bancroft, LLP  
One Embarcadero Center, Eighth Floor  
San Francisco, CA 94111  
TEL: 415.392.1960  
FAX: 415.392.0827  
EMAIL: ekahn@sideman.com  
WEB: www.sideman.com

*Ellen Kahn 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, real estate agreements, and dissolution of domestic partnerships.*

**Mario Kashou, Esq.**

Farallon Law Group, LLP  
459 Fulton Street, Suite 102  
San Francisco, CA 94102  
TEL: 415.225.2450  
FAX: 415.255.2451  
EMAIL: mkashou@farallonlaw.com  
WEB: www.farallonlaw.com

*Farallon Law Group provides low-cost estate planning services with an emphasis on serving members of the LGBT community.*

**Deb L. Kinney**

Boutiette + von Herrmann, LLP  
1 Bush Street, Suite 1150  
San Francisco, CA 94104  
TEL: 415.693.0550  
FAX: 415.693.0500  
EMAIL: deb@bvhlaw.com  
WEB: www.bvhlaw.com

*Boutiette + von Herrmann, LLP, provides a values-based approach to estate planning focusing specifically on the needs of the LGBT community.*

**Jane Brindle Miller**

711 Colorado Avenue  
Palo Alto, CA 94303  
TEL: 650.321.6011  
FAX: 650.617.0429  
EMAIL: jane@janemillerlaw.com

*Jane Miller specializes in estate planning, trust, and probate law with 24 years of experience in advising clients in selecting, implementing, and administering their estate plans, and on related tax issues.*

**Susan Alexander Myers**

The 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, post-domestic partnership registration agreements, and dissolution and custody matters.*

**Rowena C. Navia, Esq.**

Kato, Feder & Suzuki, LLP  
685 Market Street, Suite 490  
San Francisco, CA 94105  
TEL: 415.974.5715  
FAX: 415.974.6199  
EMAIL: rnavia@KFSLAW.net

*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 area 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.*

**Virginia Palmer**

Fitzgerald, Abbott & Beardsley  
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 provides estate planning, probate, trusts, elder law, and related litigation.*

**Ora S. Prochnick**

*See listing under Adoption and Domestic Relations*

**Mark 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.*

**Linda Scaparotti**

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

*Linda Scaparotti has over 24 years of experience in estate planning and family law services specifically for the LGBT community.*

**Stephanie E. Trapasso**

Smith Barney  
1001 Pagemill Road, Building #4,  
Suite 101  
Palo Alto, CA 94304  
TEL: 650.856.4536  
CELL: 415.309.9852  
FAX: 650.493.6647  
EMAIL:  
stephanie.e.trapasso@smithbarney.com  
WEB: www.fc.smithbarney.com/trapasso

*Stephanie Trapasso is a Smith Barney Financial Consultant and holds a financial planning specialist designation. Her practice focus is financial planning and asset management for individuals and couples within the LGBT community.*

## Financial Advisors

### **Rebecca Balin**

P.O. 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.*

### **Gerald Butrimovitz**

Gerald Butrimovitz & Associates

170 San Fernando Way

San Francisco, CA 94127

TEL: 415.566.0400

FAX: 415.566.6984

EMAIL: 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.*

**Catherine Chen**

Piper Jaffray – Philanthropic & Social  
Investment Consulting  
345 California Street, 22nd Floor  
San Francisco, CA 94104  
TEL: 415.984.4600  
FAX: 415.984.3601  
EMAIL: catherine.r.chen@pjc.com

*Catherine Chen provides investment consulting, focusing on socially responsible investing, asset allocation, and long-term planning.*

**Michael Cullen**

Cullen Financial Advisors/  
SunAmerica Securities, Inc.  
90 New Montgomery Street,  
Suite 1020  
San Francisco, CA 94105  
TEL: 415.781.1181  
FAX: 415.951.4654  
EMAIL:  
michaelcullen@cullenfinancial.com  
WEB: www.cullenfinancial.com

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

**Steve Cutshall, CFP®, ChFC**

SGC Financial & Insurance Services  
3 Waters Park Drive, Suite 115  
San Mateo, CA 94403  
TEL: 650.227.0381  
FAX: 650.341.1449  
EMAIL:  
steve.cutshall@sgc-financial.com  
WEB: www.sgc-financial.com

*Steve Cutshall's planning process; offered through Securian Financial Services, Inc.; provides his clients with a financial "road map" to achieve their goals and dreams.*

**Rattan Dodeja**

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

*Rattan Dodeja is a financial consultant—with licenses in the areas of investments, insurance, and managed futures.*

**Bob Dreizler**

Bob Dreizler Chartered Financial  
Consultant

2012 H Street, #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.*

**Nancy B. Epstein, CFP**

Protected Investors of America  
235 Montgomery Street, Suite 1050  
San Francisco, CA 94104

TEL: 415.398.4363

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.*

**Jim Frazin, CFP**

Your Money & Your Life®

PO Box 78261

San Francisco, CA 94107

TEL: 415.337.4566

FAX: 415.337.4566

EMAIL: jf@shibboleth.com

*Jim Frazin offers the full range of financial planning services and helps individuals, families, and organizations align their investment with their values by specializing in socially responsible options.*

**Ron Freund, CFS**

The Social Equity Group  
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.*

**John Girton, CFA**

Girton Capital Management, Inc.  
 7 La Rosa Way  
 Larkspur, CA 94939  
 TEL: 415.927.4484  
 FAX: 415.927.4486  
 EMAIL: [jjgirton@girtoncapital.com](mailto:jjgirton@girtoncapital.com)  
 WEB: [www.girtoncapital.com](http://www.girtoncapital.com)

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

**Dipti Ghosh**

Account Vice President  
 UBS Financial Services  
 One California Street, 20th floor  
 San Francisco, CA 94111  
 TEL: 415.954.6849  
 FAX: 415.954.5913  
 EMAIL: [Dipti.ghosh@ubs.com](mailto:Dipti.ghosh@ubs.com)  
 WEB: [www.ubs.com](http://www.ubs.com)

*Dipti Ghosh is a Financial Advisor with UBS Financial Services in San Francisco. For the past eighteen 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.*

**C. Sue Guynn**

Morgan Stanley  
 22320 Foothill Blvd., Suite 150  
 Hayward, CA 94541  
 TEL: 510.727.2123  
 FAX: 510.581.2311  
 EMAIL:  
[sue.guynn@morganstanley.com](mailto:sue.guynn@morganstanley.com)

*Financial planning and wealth management for individuals and small businesses. Minimum asset level \$100,000.*

**Milo F. Hanke, CFP**

LPL Financial Services  
 100 Bush Street, Suite 1675  
 San Francisco, CA 94104-3943  
 TEL: 415.781.6300  
 FAX: 415.781.6301  
 WEB: [www.lpl.com/milo.hanke](http://www.lpl.com/milo.hanke)

*Milo Hanke offers independent, fee-based investment advisory services that incorporate the individual's goals, values, temperament, and tax situations. He has twenty years of experience.*

**Richard H. Harding**

Vice President Wealth Management  
Wells Fargo  
420 Montgomery Street, 7th Floor  
MAC A0101-075  
San Francisco, CA 94104  
TEL: 415.947.5658  
FAX: 415.983.0409  
WEB: [www.wellsfargo.com/investing/pcs/](http://www.wellsfargo.com/investing/pcs/)

*A Private Client Services team advises Bay Area wealth-creators in crafting and implementing their personal wealth management plans. We approach our clients' finances in a holistic, coordinated and disciplined manner, with a deep appreciation for both economic and the human aspects of wealth management.*

**David Harris**

Legacy Solutions  
355 Gemma Circle  
Santa Rosa, CA 95404-2733  
TEL: 707.539.0241  
FAX: 877.727.6172  
EMAIL: [davidharris@legacysolutions.net](mailto:davidharris@legacysolutions.net)  
WEB: [www.legacysolutions.net](http://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.*

**Susan Hirsch**

Hirsch & Associates  
530 Howard Street, #250  
San Francisco, CA 94118  
TEL: 415.495.5408  
FAX: 415.541.8625  
EMAIL: [susan@hirschassoc.com](mailto: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.*

**Dan Joraanstad**

Wachovia Securities  
Four Embarcadero Center, 24th Floor  
San Francisco, CA 94111  
TEL: 415.395.2508  
FAX: 415.395.2561  
EMAIL:  
[Daniel.joraanstad@wachoviasec.com](mailto:Daniel.joraanstad@wachoviasec.com)  
WEB: [www.wachovia.com](http://www.wachovia.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.*

**Madison L. Kilpatrick III**

Morgan Stanley  
 101 California Street, 3rd Floor  
 San Francisco, CA 94111  
 TEL: 415.693.6264  
 FAX: 415.693.6095  
 EMAIL:  
 Madison.kilpatrick@morganstanley.com

*Madison Kilpatrick 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.*

**Nolan Madson**

Madson Advisors  
 61 Germania Street  
 San Francisco, CA 94117  
 TEL: 415.626.9023  
 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.*

**Duncan Meaney**

The Social Equity Group  
 2550 9th Street, #204A  
 Berkeley, CA 94710  
 TEL: 415.386.6570  
 FAX: 415.379.3509  
 EMAIL: Duncan@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**

Alberda, Jordan, Iller & Associates,  
 A financial advisory practice of  
 American Express Financial Advisors  
 44 Montgomery Street, Suite 4210  
 San Francisco, CA 94104  
 TEL: 415.623.2450  
 FAX: 415.392.0967  
 EMAIL: brandon.j.miller@aexp.com  
 WEB: <http://advisors.americanexpress.com/brandon.j.miller/>

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

**Daniel J. Neumann, CFA**

Neumann Capital Management  
520 S. El Camino Real, Suite 710  
San Mateo, CA 94402-1747  
TEL: 650.548.9200  
FAX: 650.548.9209  
EMAIL: dan@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.*

**Evan Oliver**

Verity Wealth Advisors, LLC  
P.O. Box 29504  
San Francisco, CA 94129-0504  
TEL: 415.561.3340  
FAX: 415.561.3344  
WEB: www.veritywealth.com

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

**Glenn Perry**

Northern Trust  
580 California Street, Suite 1800  
San Francisco, CA 94104  
TEL: 415.765.7526  
FAX: 415.765.7523  
EMAIL: glenn\_perry@ntrs.com

*Glenn Perry provides trustee, investment management, and private banking for clients of Northern Trust.*

**Gary Roof**

Roof, Eidam & Maycock  
One Post Street, Suite 2725  
San Francisco, CA 94104  
TEL: 415.788.4600  
FAX: 415.788.4606  
EMAIL: groof@roofeidammaycock.com  
WEB: www.roofeidammaycock.com

*Gary Roof offers financial planning and assets management services to individuals, corporations, trusts, and foundations.*

**Stephen M. Seewer**

Wells Fargo, Private Client Services  
 577 Castro Street  
 San Francisco, CA 94114  
 TEL: 415.621.3629  
 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 R. Simpson**

Piper Jaffray – Philanthropic & Social  
 Investment Consulting  
 345 California Street, 22nd Floor  
 San Francisco, CA 94104  
 TEL: 415.984.4601  
 FAX: 415.984.3601  
 EMAIL: [maryann.r.simpson@pjc.com](mailto:maryann.r.simpson@pjc.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 #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 the only gay-owned registered investment advisor in the Bay Area, providing financial planning, retirement planning, estate planning, and investment management services.*

**Barry Taylor**

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](mailto:barry.taylor@bosinvest.com)

*Bingham, Osborn & Scarborough, LLC is a comprehensive wealth management firm offering financial planning and investment management services. Barry Taylor is a certified financial planning professional and current Chair of the San Francisco Chapter of the Financial Planning Association.*

**Lisa Tracy**

Coach and Philanthropic Advisor  
Philanthropy Vision  
2936 Domingo St., Suite 1  
Berkeley, CA 94705  
TEL: 510.548.1606  
FAX: 877.839.9292  
EMAIL: Lisa@PhilanthropyVision.com

*Lisa Tracy is a philanthropy coach. She is one of a handful of financial planners nationally who specializes in philanthropic planning. She helps individuals to 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.*

**Aliso Wise**

Progressive Asset Management  
1730 Franklin Street, #201  
Oakland, CA 94612  
TEL: 510.622.0202  
FAX: 510.287.2419  
EMAIL: information@progressive  
assetmanagement.com

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

**Andrew A. Zittell, CLU, RFC**  
**Bruce A. Frankel CSA, MBA**  
**Stephen G. Daugherty, EA**  
**Victoria A. Clarke**

Yerba Buena Financial Partners, LLC  
2533 Ocean Avenue, Ste. 201  
San Francisco, CA 94132  
TEL: 415.334.8000  
FAX: 415.334.8500  
WEB: www.ybfp.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 whose services include: investment advisory services, personal and business insurance planning, estate planning, college planning, tax planning, and customized retirement plan designs for small and medium sized business owners.*

## Accountants

**Michael C. Berg**

Pohl, McNabola, Berg & Company  
50 Francisco Street, Suite 120  
San Francisco, CA 94133  
TEL: 415.399.1330  
FAX: 415.399.9212

*Pohl, McNabola, Berg & Company is a certified public accounting and consulting firm, specializing in audit and tax services.*

**Chris Kollaja**

A.L. Nella Company  
1390 Market Street, Suite 1004  
San Francisco, CA 94102  
TEL: 415.621.2424

**Nannette Lee Miller**

Stonefield Josephson, Inc.  
655 Montgomery Street, Suite 1220  
San Francisco, CA 94111-2646  
TEL: 415.981.9400 x605  
FAX: 415.391.2310  
EMAIL: nmiller@sjaccounting.com

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

**Arlene Mose**

367 Civic Drive, Suite 6  
Pleasant Hill, CA 94523  
TEL: 945.680.0110

**Leonard Stec**

Stec & Beckman  
1832 Folsom Street, Suite 1000  
San Francisco, CA 94104  
TEL: 415.357.5000  
FAX: 415.357.2827  
EMAIL: lensteccpa@aol.com

*Leonard Stec provides financial services to individuals and businesses.*

**Randy Zamarra**

Daoro Zydell & Holland, CPAs  
180 Montgomery Street, #700  
San Francisco, CA 94104  
TEL: 415.781.2500  
FAX: 415.781.2530  
EMAIL: randy@dzh.com  
WEB: www.dzh.com

*Daoro, Zydell & Holland provide accounting and auditing services, tax services, estate and trust services, and IRS problem resolution services.*

**Jan Zobel, EA**

Jan Zobel, EA Tax Services  
Offices in San Francisco and Oakland  
TEL: 510.482.1015  
TEL: 415.821.1015  
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 J. Alexander**

*See listing under Estate Planning Attorneys*

**Alexis C. Beach**

Rachel Lederman and Alexis C. Beach,  
Attorneys at Law  
558 Capp Street  
San Francisco, CA 94110  
TEL: 415.282.9300  
FAX: 415.285.5066  
EMAIL: acbeach@zmomslaw.com

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

**Eva Hertzner**

388 Colusa Avenue  
Kensington, CA 94707  
TEL: 510.526.5144

*Eva Hertzner provides mediation of disputes, relationship agreements, wills, and powers of attorney.*

**Frederick C. Hertz**

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

*The law offices of Frederick Hertz provide legal counsel with regard to the formation and dissolution of same-sex domestic partnerships, mediation, and arbitration services.*

**Elizabeth D. "BX" Long**

Law Office of Elizabeth D. Long  
345 Franklin Street  
San Francisco, CA 94102  
TEL: 415.431.9315  
FAX: 415.431.9316  
EMAIL: bxlong@bxlonglaw.com  
WEB: www.bxlonglaw.com

*BX Long offers full legal representation, unbundled legal services, mediation, and collaborative law for family law matters, including domestic partnership and relationship formation and dissolution, and legal work related to child support, custody, and visitation.*

**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  
WEB: www.familyformation.com

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

**Susan Alexander Myers**

*See listing under Estate Planning*

**Andrea 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

*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

*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.*

**Charlie Spiegel**

Law Offices of Charles Spiegel  
TEL: 415.643.6888  
EMAIL: czs@sbcglobal.net

*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.*

**Deborah Wald**

Attorney at Law  
915 Cole Street, #278  
San Francisco, CA 94117  
TEL: 415.648.3097  
FAX: 415.648.3098  
EMAIL: dhwald@sbcglobal.net

*Deborah Wald has a family building legal practice, including adoptions of all kinds, parentage actions for lesbian couples doing ova sharing, and limited advice on surrogacy matters.*

## Fiduciaries

**Elizabeth Callaway**

Elizabeth Callaway Trust Services  
P. O. 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**

P. O. Box 159  
San Leandro, CA 94577-0659  
TEL: 510.351.2609  
FAX: 510.351.8609

**James A. Frazin**

*See listing under Financial Advisors*

**Richard H. Harding**

*See listing under Financial Advisors*

**Scott R. Hodges**

TEL: 415.923.1116

**David Johnson**

Coming Home  
 825 Van Ness Avenue #604  
 San Francisco, CA 94109-7893  
 TEL: 415.474.2250  
 FAX: 415.474.2227  
 EMAIL: comehome@sonic.net

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

**Thomas A. Lucas, LCSW**

P. O. Box 14092  
 San Francisco, CA 94114  
 TEL: 415.552.2042  
 FAX: 415.358.4119

**Rowena C. Navia, Esq.**

*See listing under Estate Planning*

**thom grexa phillips**

Coming Home  
 825 Van Ness Avenue, #604  
 San Francisco, CA 94109-7893  
 TEL: 415.474.2250  
 FAX: 415.474.2227  
 EMAIL: comehome@sonic.net

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

**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.*

**Stephanie Trapasso**

*See listing under Estate Planning*

## Useful Websites and Organizations

### **Nolo Press**

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

*Nolo's mission is to make the legal system work for everyone, not just lawyers. Nolo's 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 publication Legal Guide for Lesbian and Gay Couples. Their publications and products also include Nolo's Simple Will Book, Plan Your Estate, and Quicken's Willmaker Plus.*

### **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.*

**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 downloadable booklet entitled "Life Planning: Legal Documents & Protections for Lesbians and Gay Men."*

**Partnership for Caring**

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

*This site has downloadable living wills and healthcare proxy forms.*

**Human Rights Campaign's FamilyNet**

[www.hrc.org/familynet](http://www.hrc.org/familynet)

*HRC FamilyNet is a comprehensive and up-to-date resource on LGBT families, including sample legal documents.*

**Bay Area Lawyers for  
Individual Freedom**

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

*An association of LGBT persons in the field of law.*

**Pride Planners™**

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

*Provides marketing, educational, and networking opportunities to financial professionals who serve the LGBT community.*

**To register or terminate 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)