



Fiduciary Round Table  
of the  
San Gabriel Valley

2022 - 2023

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Paul Albarian**

Paul Albarian & Associates, LLC

1049 E. Valencia Ave.

Burbank 91501

Cell: (818) 200-8816

Phone: (818) 200-8816

Email: paul@albariancoins.com

albariancoins.com

Category(ies): Appraiser - Personal, Estate Liquidation

### **Dennis Barrocas**

Cornerstone R/E Management, Inc.

540 El Dorado St., Suite 101

Pasadena 91101

Cell: 626-664-1760

Phone: 626-577-3060

Email: dennisb@managedbycornerstone.com

managedbycornerstone.com

Category(ies): Real Estate Services

### **LeeAnn Allman**

Allman Assisted Transition dba Assisted Living Locators

599 S. Barranca Ave., #216

Covina 91723

Cell: (818) 416-2734

Phone: (626) 966-7111

Fax: (626) 966-4245

Email: leeanna@assistedlivinglocators.com

assistedlivinglocators.com/sangabrielvalley

Category(ies): Retirement Community, Relocation Services

### **Michael Bernard**

Bernard & Johnson, LLC

201 S. Lake Ave., Suite 502

Pasadena 91101

Cell: 818-207-6299

Phone: 626-405-2920

Fax: 626-405-2997

Email: michael.bernard@bernardandjohnson.com

bernardandjohnson.com

Category(ies): Financial Planning, Investment Advisor

### **Mary Bowser, NMLS ID 447947**

Wells Fargo

350 W. Colorado Blvd., Suite 220

Pasadena 91105

Cell: (626) 616-2537

Phone: (626) 585-4370

Fax: (866) -683-6795

Email: mary.f.bowser@wellsfargo.com

homeloans.wellsfargo.com/mortgage/ca/pasadena/mary-bowser

Category(ies): Real Estate Services

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Adam Bray-Ali**

Coldwell Banker  
388 S. Lake Ave.  
Pasadena 91101  
Cell: (213) 399-1940  
Phone: (213) 399-1940  
Email: adam@propertybyadam.com  
propertybyadam.com  
Category(ies): Estate Liquidation, Real Estate Services

### **Wes Bryant**

Manufacturers Bank  
520 N. Brand Ave., Suite 175  
Glendale 91203  
Cell: 818-259-4836  
Phone: 818-259-4836  
Email: wbryant@manubank.com  
manubank.com  
Category(ies): Estate Administrator, Trust Services - Private

### **Jacqueline Burnson-Whall**

FirstLight Home Care  
612 W. Duarte Rd., Suite 404  
Arcadia 91007  
Cell: (626) 222-2363  
Phone: (626) 623-8064  
Fax: (626) 360-0108  
Email: jburnson@firstlighthomecare.com  
pasadena.firstlighthomecare.com  
Category(ies): Home Care, Home Health & Skilled Care

### **Jodi Carr**

Home Instead  
3550 Wilshire Blvd., Suite 700  
Los Angeles 90010  
Cell: (323) 479-1444  
Phone: (323) 479-1444  
Email: jodi.care@homeinstead.com  
homeinstead.com  
Category(ies): Home Care, Health and Wellness

### **Susanne Cohen**

Hahn & Hahn LLP  
301 E. Colorado Blvd., 9th Floor  
Pasadena 91101  
Cell: (510) 965-3938  
Phone: (626) 796-9123  
Fax: (626) 449-7357  
Email: scohen@hahnlawyers.com  
hahnlawyers.com  
Category(ies): Attorney - Probate & Estate, Attorney - Elder Law

### **Cynthia Cohn**

Cynthia Cohn & Associates, Inc.  
3016 E. Colorado Blvd., #70063  
Pasadena 91117  
Cell: (626) 714-6808  
Phone: (626) 714-6808  
Email: cynthia@cynthiacohn.com  
cynthiacohn.com  
Category(ies): Real Estate Services

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **John Cooper**

Fiduciary  
P.O. Box 50101  
Pasadena 91115  
Cell: (323) 240-3993  
Phone: (323) 240-3993  
Fax: (866) 395-1402  
Email: ok3@pacbell.net  
Category(ies): Estate Administrator, Trust Services - Private

### **Jan Copley**

Pasadena Law Group  
155 N. Lake Ave., Suite 800  
Pasadena 91101  
Cell: (626) 818-8264  
Phone: (626) 696-3145  
Email: jan@pasadenalawgroup.com  
pasadenalawgroup.com  
Category(ies): Attorney - Probate & Estate, Attorney - Elder Law

### **Claude Delgado**

KelKeller Williams  
9902 Bogue St.  
Temple City 91780  
Cell: 626-625-0266  
Phone: 626-625-0266  
Email: claude@delgadore.com  
delgadore.com  
Category(ies): Real Estate Services, Relocation Services

### **Theresa Deliberto**

Family Records Management  
1508 Arroyo View Dr.  
Pasadena 91103  
Cell: (818) 554-7783  
Phone: (818) 554-7783  
Fax: (818) 797-3002  
Email: tdeliberto@recordsorg.com  
recordsorg.com  
Category(ies): Estate Administrator, Trust Services - Private

### **Kiran Dhillon**

KW Commercial  
720 Sycamore Ave.  
Glendora 91741  
Cell: (626) 716-2504  
Phone: (310) 295-0013  
Email: kiran@sigcommercial.com  
sigcommercial.com  
Category(ies): Real Estate Services

### **Robert Earnest**

Earnest Fiduciary  
122-A E. Foothill Blvd., #217  
Arcadia 91006  
Cell: (626) 230-7404  
Phone: (626) 888-6405  
Email: robert@earnestfi.com  
earnestfi.com  
Category(ies): Estate Administrator, Trust Services - Private

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Dana Ehrman**

Luxury Selling Solutions  
318 Southridge Dr.  
Oak Park 91377  
Cell: (310) 736-5896  
Phone: (310) 736-5896  
Email: luxurysellingsolutions@gmail.com  
luxurysellingsolutions.com  
Category(ies): Estate Liquidation, Auction Broker

### **Xavier Figueroa**

LA Trash Junkers llc  
3914 Center St.  
Baldwin Park 91706  
Cell: (532) 262-9978  
Phone: (562) 262-9978  
Email: xavier@latrashjunkers.com  
latrashjunkers.com  
Category(ies): Estate Liquidation, Relocation Services

### **Joel Forman**

JLF Appraisal Services  
11260 Overland Ave., Unit 9G  
Culver City 90230  
Cell: (310) 994-9373  
Phone: (310) 837-7455  
Email: joel.forman1@gmail.com  
jlf-appraisals.com  
Category(ies): Appraiser - Personal, Estate Liquidation

### **Anne Gifford Ewing**

Capital Group Private Client Services  
333 S. Hope St., 46th Floor  
Los Angeles 90071  
Cell: (213) 590 0990  
Phone: (213) 615 0637  
Email: aeg@caproup.com  
capitalgroup.com/pcs  
Category(ies): Attorney - Probate & Estate, Trust Services - Corporate

### **Chris Glaeser**

ACTIV Trust Management  
P.O. Box 243  
South Pasadena 91031  
Cell: (626) 497-2081  
Phone: (626) 497-2081  
Email: chris@activtm.com  
activtm.com  
Category(ies): Conservator, Estate Administrator

### **Sam Gopinathan**

New Wave Home Care  
1350 N. Altadena Dr., Suite B  
Pasadena 91107  
Cell: (626) 898-2913  
Phone: (888) 385-9898  
Fax: (877) 676-0635  
Email: sam@newwavehomecare.com  
newwavehomecare.com  
Category(ies): Care Management, Home Care

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Carrie Boreham Grochow**

Dilbeck Real Estate  
1030 Foothill Blvd.  
La Canada Flintridge 91011  
Cell: (818) 731-4749  
Phone: (818) 731-4749  
Email: [carrie.grochow@dilbeck.com](mailto:carrie.grochow@dilbeck.com)  
[carriegrochow.com](http://carriegrochow.com)  
Category(ies): Real Estate Services, Relocation Services

### **Lisa Grod, PhD MSCPG BCPA**

LWG & Associates  
6520 Platt Ave., #853  
West Hills 91307  
Cell: (818) 599-4224  
Phone: (818) 599-4224  
Email: [lawgrod@gmail.com](mailto:lawgrod@gmail.com)  
Category(ies): Care Management, Home Health & Skilled Care

### **A. Hillary Grosberg**

Law Offices of A. Hillary Grosberg  
16000 Ventura Blvd., Suite 1000  
Encino 91436  
Phone: (818) 789-1593  
Email: [hillary@annhillary.com](mailto:hillary@annhillary.com)  
[annhillary.com](http://annhillary.com)  
Category(ies): Attorney - Probate & Litigation, Attorney - Other

### **Becky Happach**

New Wave Home Care  
1350 Altadena Dr., Suite B  
Pasadena 91107  
Cell: (818) 645-9700  
Phone: 626-989-3027  
Fax: 877-676-0635  
Email: [becky@newwavehomecare.com](mailto:becky@newwavehomecare.com)  
[newwavehomecare.com](http://newwavehomecare.com)  
Category(ies): Home Care

### **Paul P. Hargraves**

Trust Properties USA  
1055 E. Colorado Blvd.  
Pasadena 91106  
Cell: (310) 362-4829  
Phone: (800) 579-4380  
Email: [paul@trustpropertiesusa.com](mailto:paul@trustpropertiesusa.com)  
[trustpropertiesusa.com](http://trustpropertiesusa.com)  
Category(ies): Real Estate Services

### **Corey Harper**

NAI Capital Commercial, Inc.  
225 S. Lake Ave., #1170  
Pasadena 91101  
Cell: (626) 375-6486  
Phone: (626) 204-1526  
Fax:  
Email: [corey.harper@naicapital.com](mailto:corey.harper@naicapital.com)  
[coreyharper.com](http://coreyharper.com)  
Category(ies): Real Estate Services, Appraiser - Real Property

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Suzanne Hazel**

Southeby's International Realty  
800 E. Colorado Blvd., Suite 150  
Pasadena 91101  
Cell: (626) 229-0515  
Phone: (626) 429-8600  
Fax: (626) 396-3902  
Email: suzy.hazel@sothebyshomes.com  
suzannehazel.com  
Category(ies): Real Estate Services

### **Mary House**

Alternative Resolution Centers  
1787 Loma Vista St.  
Pasadena 91104  
Cell: (626) 482-2799  
Phone: (626) 356-5058  
Email: marythorntonhouse@yahoo.com  
arc4adr.com  
Category(ies): Attorney - Mediation, Attorney - Probate & Litigation

### **Marcia Israel**

Stan Israel Insurance Services, Inc.  
5739 Kanan Rd., #367  
Agoura Hills 91301  
Cell: (818) 400-1291  
Phone: (818) 706-1100  
Fax: (818) 889-1593  
Email: marcia@sdiins.com  
sdiins.com  
Category(ies): Insurance

### **Stan Israel**

Stan Israel Insurance Services, Inc.  
5739 Kanan Rd., # 367  
Agoura Hills 91301  
Cell: (818) 400-1278  
Phone: (818) 706-1100  
Fax: (818) 889-1593  
Email: sdiins@aol.com  
sdiins.com  
Category(ies): Insurance

### **Pati Johns**

Continuity Care Home Nurses  
12722 Riverside Dr.  
North Hollywood 91607  
Cell: (818) 903-5332  
Phone: (818) 753-5106  
Fax: (818) 753-5109  
Email: pjohns@cchomenurses.com  
cchomenurses.com  
Category(ies): Home Care, Home Health & Skilled Care

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Christopher Johnson**

Law Offices of Christopher B. Johnson  
180 N. Pennsylvania Ave.  
Glendora 91741  
Cell: (818) 317-8675  
Phone: (888) 503-7615  
Fax:  
Email: cjohnson@christopherbjohnson.com  
christopherbjohnson.com  
Category(ies): Attorney - Probate & Estate, Attorney - Probate & Litigation

### **Jodie Kendall**

Villa Gardens – a Front Porch Community  
842 E. Villa St.  
Pasadena 91101  
Phone: 626-463-5329  
Fax: 626-568-9606  
Email: jkendall@frontporch.net  
villagardens.org  
Category(ies): Residential Care, Retirement Community

### **Jim Konoske**

Jim Konoske Consulting  
3506 Crooked Creek  
Diamond Bar 91765  
Cell: (951) 218-1341  
Phone: (626) 965-5789  
Email: jimkonoske@verizon.net  
jimkonoske.com  
Category(ies): Estate Liquidation, Auction Broker

### **Lisa Kroese**

National Estate Sales Association  
125 N. Marengo Ave.  
Pasadena 91101  
Cell: (626) 755-0636  
Phone: (626) 755-0636  
Email: lisa@pasadenaappraiser.com  
pasadenaappraiser.com  
Category(ies): Fine Art Agent, Real Estate Services

### **Daniel Kuo**

Rose Valley Assisted Living Homes  
150 N. Santa Anita Ave., #300  
Arcadia 91006  
Cell: 626-272-9058  
Phone: 626-272-9058  
Email: danielnakuo@gmail.com  
rosevalleyrcfe.com  
Category(ies): Home Care, Residential Care

### **Regina Lark**

A Clear Path: Professional Organizing and Productivity  
2355 Westwood Blvd., #359  
Los Angeles 90064  
Cell: (818) 400-9592  
Phone: (818) 400-9592  
Email: regina@aclearpath.net  
aclearpath.net  
Category(ies): Estate Liquidation, Relocation Services



## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Steven Lazerson**

Peak Finance Company  
154-A W. Foothill Blvd., #150  
Upland 91786  
Cell: 562-818-3502  
Phone: 562-818-3502  
Fax: 909-218-4385  
Email: financialbrokerssl@gmail.com  
financialbrokers.net  
Category(ies): Insurance, Reverse Mortgages

### **Nancy Lenik**

City National Bank  
111 S. De Lacey Ave., Unit 217  
Pasadena 91105  
Cell: 818-681-2948  
Phone: 818-265-5653  
Fax: 818-265-5646  
Email: nancy.lenik@cnb.com  
cnb.com  
Category(ies): Trust Services - Corporate

### **John Luong**

Oaks of Pasadena  
2954 E. Del Mar Blvd.  
Pasadena 91107  
Cell: (310) 951-4702  
Phone: (626) 356-2600  
Fax: (626) 356-2596  
Email: john.luong@pasadenaoaks.com  
oaksofpasadena.com  
Category(ies): Residential Care, Retirement Community

### **Jim Maceo**

Keller Williams Realty  
533 S. Hudson Ave., #8  
Pasadena 91101  
Cell: (818) 424-4577  
Phone: (626) 204-3300  
Email: jimmaceo@gmail.com  
jimmaceorealestate.com  
Category(ies): Real Estate Services, Relocation Services

### **Kirk Marangi**

Kirk Marangi Economic Valuations  
225 S. Lake Ave., Suite 300  
Pasadena 91101  
Cell: (626) 627-7992  
Phone: (626) 627-7992  
Email: kirk@kmecon.com  
kmecon.com  
Category(ies): Business Valuation

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Roberta Marr**

Trust Properties USA  
7923 Sale Ave.  
West Hills 91304  
Cell: (860) 917-0418  
Phone: (310) 362-4836  
Email: roberta@trustpropertiesusa.com  
trustpropertiesusa.com  
Category(ies): Real Estate Services, Trust Services - Private

### **Heidi Mattson**

Wright Kim Douglas, ALC  
130 S. Jackson St.  
Glendale 91205  
Cell: (714) 496-1344  
Phone: (626) 356-3900  
Email: heidi@wkdlegal.com  
wkdlegal.com  
Category(ies): Attorney - Probate & Estate, Attorney - Probate & Litigation

### **Don McCue**

Reverse Mortgages Plus  
15895 Jackson Dr.  
Fontana 92336  
Cell: (828) 482-9771  
Phone: (909) 822-3036  
Fax: (626) 387-6440  
Email: don@reversemortgagesplus.info  
reversemortgagesplus.info  
Category(ies): Financial Planning, Reverse Mortgages

### **Alfredo Mejia**

CIBA Real Estate  
830 S. Myrtle Ave.  
Monrovia 91016  
Cell: (626) 841-0599  
Phone: (626) 841-0599  
Email: alfredo@cibare.com  
cibare.com  
Category(ies): Real Estate Services

### **Mindy Morrison**

Back Office People  
2953 Honolulu Ave., #4  
La Crescenta 91214  
Cell: (818) 669-9659  
Phone: (818) 669-9659  
Email: mindy@backofficepeople.com  
backofficepeople.com  
Category(ies): Bookkeeping & Fiduciary Accounting

### **Michael Noll**

Michael Noll & Associates, Inc.  
61 S. Baldwin Ave., Unit 1147  
Sierra Madre 91024  
Cell: 626-818-5564  
Phone: 626-657-2287  
Fax: 626-227-0710  
Email: mike@michaelnollassoc.com  
michaelnollassoc.com  
Category(ies): Estate Administrator, Trust Services - Private

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Eric Olson**

Baker, Olson, LeCroy & Danielian

100 W. Broadway, #990

Glendale 91210

Cell: (626) 224-5619

Phone: (626) 224-5619

Email: eoesq@boldlaw.com

boldlaw.com

Category(ies): Attorney - Probate & Litigation, Attorney - Other

### **Kenny Ossen**

Senior Living Advocates

8900 Jaylee Dr.

San Gabriel 91775

Cell: (626) 222-0629

Phone: (626) 222-0629

Email: seniorlivingadvocates@gmail.com

seniorlivingadvocates.org

Category(ies): Retirement Community, Relocation Services

### **Antoinette Painter**

Advocates for Aging

449 W. Foothill Blvd., Suite 309

Glendora 91741

Cell: 626-771-6964

Phone: 626-771-6964

Fax: 800-303-6510

Email: antoinette@advocatesforaging.com

advocatesforaging.com

Category(ies): Care Management, Health and Wellness

### **David Painter**

Advisors In Placement, Inc

928 N. Woodbine Way

Azusa 91702

Cell: 310-801-8560

Phone: 310-801-8560

Email: david.painter@advisorsinplacement.com

advisorsinplacement.com

Category(ies): Care Management, Relocation Services

### **Carol Peters**

Law Office of Carol A. Peters

1107 Fair Oaks, Suite 102

South Pasadena 91030

Cell: 626-375-1394

Phone: 626-793-9383

Email: cpeters@elderlegalhelp.com

elderlegalhelp.com

Category(ies): Attorney - Probate & Estate, Attorney - Elder Law

### **Howard Raff**

Diversified Securities, Inc.

511 E. Mendocino St.

Altadena 91001

Cell: (626) 712-4920

Phone: (626) 712-4920

Email: hraff@divsecs.com

dsifg.com

Category(ies): Financial Planning, Investment Advisor

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Nevino Rocco**

Homewatch CareGivers of Pasadena  
12 S. Raymond Ave., Suite C  
Pasadena 91105  
Cell: (310) 729-1225  
Phone: (626) 386-2425 ext 101  
Fax: (626) 314-2524  
Email: nrocco@hwcg.com  
hwcg.com/pasadena  
Category(ies): Home Care

### **Sarah Rogers**

Sarah Rogers Real Estate Group  
225 S. Lake Ave., Suite 100  
Pasadena 91101  
Cell: 626-390-0511  
Phone: 626-390-0511  
Email: sarah@sarahrogersststes.com  
sarahrogersrealestate.com  
Category(ies): Real Estate Services, Relocation Services

### **Julie Sagatelian**

Waddell & Reed  
70 S. Lake Ave., Suite 950  
Pasadena 91101  
Cell: (626) 688-8810  
Phone: (626) 356-7556  
Fax:  
Email: jsagatelian@wradvisors.com  
yourfinancialfuture.wradvisors.com  
Category(ies): Financial Planning, Investment Advisor

### **Maryanne Sawoski, RN BSN PHN CCM**

Continuity Care Home Nurses  
12722 Riverside Dr., Suite 108  
North Hollywood 91607  
Cell: (818) 730-8490  
Phone: (818) 753-5106  
Fax: (818) 753-0014  
Email: administrator@cchomenurses.com  
cchomenurses.com  
Category(ies): Home Care, Home Health & Skilled Care

### **Irv Selman**

Selman Insurance Services - Life Settlements  
23151 Mariano St.  
Woodland Hills 91367  
Cell: (818) 590-6910  
Phone: (818) 590-6910  
Fax: (818) 301-5193  
Email: irv.selman@gmail.com  
selmaninsuranceservice.com  
Category(ies): Financial Planning, Insurance

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### Joseph Sirgy

Trilogy Financial Services  
1000 Lakes Dr., Suite 325  
West Covina 91105  
Cell: (626) 644-1103  
Phone: (626) 646-1106  
Fax: (626) 918-0990  
Email: joseph.sirgy@trilogyfs.com  
trilogyfs.com  
Category(ies): Financial Planning, Insurance

### Stephen Smith

Meridian Real Estate Appraising & Consulting  
2476 E. Mountain St.  
Pasadena 91104  
Cell: (310) 908-1779  
Phone: (213) 236-3669  
Email: meridianappraising@yahoo.com  
meridianreservices.com  
Category(ies): Real Estate Services, Appraiser - Real Property

### Ron Stoffers

RAS Consulting & Fiduciary Services  
2960 Huntington Dr., #80498  
San Marino 91118  
Cell: (626) 818-9479  
Phone: (626) 818-9479  
Email: ronastoffers@gmail.com  
Category(ies): Conservator, Estate Administrator

### Lorine Stoikowitz

Gentle Transitions of California  
826 Random Ln.  
Bradbury 91010  
Cell: (626) 476-2461  
Phone: (800) 619-3049  
Fax:  
Email: lorine@gentletransitions.com  
gentletransitions.com  
Category(ies): Relocation Services

### Samuel Thomas

Thomas Care Management-Fiduciary Services  
1443 E. Washington Blvd., # 234  
Pasadena 91104  
Cell: (818) 599-4882  
Phone: (818) 599-4882  
Fax: (626) 270-6000  
Email: samuelt1940@outlook.com  
thomascaremanagement.com  
Category(ies): Estate Administrator, Trust Services - Private

### William Ukropina

Coldwell Banker Commercial  
2339 Lambert Dr.  
Pasadena 91107  
Cell: (626) 233-0383  
Phone: (626) 233-0383  
Email: bill.ukropina@cbcncrt.com  
cbcworldwide.com  
Category(ies): Real Estate Services, Appraiser - Real Property

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Nancy Valentine**

DPP (Deasy Penner Podley)  
200 S. Los Robles Ave., #100  
Pasadena 91101  
Cell: (818) 259-4270  
Phone: (818) 259-4270  
Email: nancy@nancyvalentine.com  
nancyvalentine.com  
Category(ies): Real Estate Services

### **Noelle Valentino**

Chubb  
555 S. Flower St.  
Los Angeles 90071  
Cell: (626) 628-9344  
Phone: (213) 200-4438  
Email: noelle.valentino@chubb.com  
chubb.com  
Category(ies): Appraiser - Personal, Estate Liquidation

### **Jennifer Vane**

Wright Kim Douglas, ALC  
130 S. Jackson St.  
Glendale 91205  
Cell: 626-808-7176  
Phone: 626-356-3900  
Email: jennifer@wkdlegal.com  
wkdlegal.com  
Category(ies): Attorney - Probate & Estate, Attorney - Probate  
Litigation

### **Leticia Villegas**

Leticia Villegas, CPA Inc  
3452 E. Foothill Blvd., Suite 125  
Pasadena 91107  
Cell: (626) 644-5862  
Phone: (626) 219-0220  
Fax:  
Email: lety@lv-cpa.com  
lv-cpa.com  
Category(ies): Bookkeeping & Fiduciary Accounting, Tax Services

### **Matt Weaver**

Weaver Insurance  
711 Camino Real  
Arcadia 91007  
Cell: (626) 688-0407  
Phone: (626) 688-0407  
Fax: (626) 445-3827  
Email: matt@weaverinsurance.com  
weaverinsurance.com  
Category(ies): Insurance

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Mary Winners**

About Senior Solutions  
525 Myrtle Ave., Suite 218  
Monrovia 91016  
Cell: (626) 665-9992  
Phone: (626) 359-0108  
Fax: (626) 359-0111  
Email: mary@aboutseniorsolutions.com  
aboutseniorsolutions.com  
Category(ies): Care Management

### **Mathew Wrenshall**

RMO LLP  
901 Bringham Ave.  
Los Angeles 90049  
Cell: (412) 580-9515  
Phone: (424) 320-9446  
Email: wrenshallm@rmolawyers.com  
rmolawyers.com  
Category(ies): Attorney - Probate & Litigation

### **Kendyl Young**

ADU DIGGS  
4728 Castle Rd  
La Canada Flintridge 91011  
Cell: (818) 482-1885  
Phone: (818) 482-1885  
Email: kendyl@kendylyoung.com  
adudiggs.com  
Category(ies): Real Estate Services

## Member Categories

### **Appraiser - Personal**

Albarian, Paul  
Forman, Joel  
Valentino, Noelle

### **Appraiser - Real Property**

Harper, Corey  
Smith, Stephen  
Ukropina, William

### **Attorney - Elder Law**

Cohen, Susanne  
Copley, Jan  
Peters, Carol

### **Attorney - Mediation**

House, Mary

### **Attorney - Other**

Grosberg, A. Hillary  
Olson, Eric

### **Attorney - Probate & Estate**

Cohen, Susanne  
Copley, Jan  
Gifford Ewing, Anne  
Johnson, Christopher  
Mattson, Heidi  
Peters, Carol  
Vane, Jennifer

### **Attorney - Probate & Litigation**

Grosberg, A. Hillary  
House, Mary  
Johnson, Christopher  
Mattson, Heidi  
Olson, Eric  
Vane, Jennifer  
Wrenshall, Mathew

### **Auction Broker**

Ehrman, Dana  
Konoske, Jim

### **Bookkeeping & Fiduciary Accounting**

Morrison, Mindy

Villegas, Leticia

### **Business Valuation**

Marangi, Kirk

### **Care Management**

Gopinathan, Sam  
Grod, PhD MSCPG BCPA, Lisa  
Painter, Antoinette  
Painter, David  
Winners, Mary

### **Conservator**

Glaeser, Chris  
Stoffers, Ron



## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### **Estate Administrator**

Bryant, Wes  
Cooper, John  
Deliberto, Theresa  
Earnest, Robert  
Glaeser, Chris  
Noll, Michael  
Stoffers, Ron  
Thomas, Samuel

### **Estate Liquidation**

Albarian, Paul  
Bray-Ali, Adam  
Ehrman, Dana  
Figueroa, Xavier  
Forman, Joel  
Konoske, Jim  
Lark, Regina  
Valentino, Noelle

### **Financial Planning**

Bernard, Michael  
McCue, Don  
Raff, Howard  
Sagatelian, Julie  
Selman, Irv  
Sirgy, Joseph

### **Fine Art Agent**

Kroese, Lisa

### **Health and Wellness**

Carr, Jodi  
Painter, Antoinette

### **Home Care**

Burnson-Whall, Jacqueline  
Carr, Jodi  
Happach, Becky  
Gopinathan, Sam  
Johns, Pati  
Kuo, Daniel  
Rocco, Nevino  
Sawoski, RN BSN PHN CCM, Maryanne

### **Home Health & Skilled Care**

Burnson-Whall, Jacqueline  
Grod, PhD MSCPG BCPA, Lisa  
Johns, Pati  
Sawoski, RN BSN PHN CCM, Maryanne

### **Insurance**

Israel, Marcia  
Israel, Stan  
Lazerson, Steven  
Selman, Irv  
Sirgy, Joseph  
Weaver, Matt

### **Investment Advisor**

Bernard, Michael  
Raff, Howard  
Sagatelian, Julie

## 2022 – 2023 Fiduciary Round Table of the San Gabriel Valley Members

### Real Estate Services

Barrocas, Dennis  
Bowser, NMLS ID 447947, Mary  
Bray-Ali, Adam  
Cohn, Cynthia  
Delgado, Claude  
Dhillon, Kiran  
Grochow, Carrie Boreham  
Hargraves, Paul P.  
Harper, Corey  
Hazel, Suzanne  
Kroese, Lisa  
Maceo, Jim  
Marr, Roberta  
Mejia, Alfredo  
Rogers, Sarah  
Smith, Stephen  
Ukropina, William  
Valentine, Nancy  
Young, Kendyl

### Relocation Services

Allman, LeeAnn  
Delgado, Claude  
Figueroa, Xavier  
Grochow, Carrie Boreham  
Lark, Regina  
Maceo, Jim  
Ossen, Kenny  
Painter, David  
Rogers, Sarah  
Stoikowitz, Lorine

### Residential Care

Kendall, Jodie  
Kuo, Daniel  
Luong, John

### Retirement Community

Allman, LeeAnn  
Kendall, Jodie  
Luong, John  
Ossen, Kenny

### Reverse Mortgages

Lazerson, Steven  
McCue, Don

### Tax Services

Villegas, Leticia

### Trust Services - Corporate

Gifford Ewing, Anne  
Lenik, Nancy

### Trust Services - Private

Bryant, Wes  
Cooper, John  
Deliberto, Theresa  
Earnest, Robert  
Marr, Roberta  
Noll, Michael  
Thomas, Samuel