

## Financial Health Advisory Council



**Susan S. Brousseau,**  
**CLU, ChFC, CFP®**

Senior Vice President  
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**Areas of Concentration:**

Investment advisory services, comprehensive financial analysis including implementation of estate planning, investment planning, retirement planning

**Education and Training:**

College of Charleston, Medical Technology

**Professional and Civic Activities:**

Central Arizona Estate Planning Council; Society of Financial Services Professionals; Financial Planning Association; Pinnacle Presbyterian Church Finance Committee; Pinnacle Presbyterian Church Chancel Choir; PEO



**Andrea L. Claus**

Attorney at Law/Partner  
**Bivens & Associates, PLLC**  
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**Areas of Concentration:**

Estate planning, probate and trust administration

**Education and Training:**

BA, Arizona State University; JD, Arizona Summit Law School

**Professional and Civic Activities:**

Board of Directors, UMOM; Professional Advisor's Council, Southwest Autism Research & Resource Center; Arizona Women's Lawyer Association; Maricopa County Bar Association's Estate Planning, Probate & Trust Section



**Brett Gaboury**

Agent  
**State Farm**  
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480-508-2000  
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**Areas of Concentration:**

Auto, home and personal liability insurance; life insurance; disability insurance

**Education and Training:**

BS, Arizona State University, W.P. Carey School of Business

**Professional and Civic Activities:**

Board Member, NAIFA Phoenix Chapter



**L. Jane Heist**

Certified Public Accountant  
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Scottsdale, AZ 85255  
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**Areas of Concentration:**

Portfolio management, tax planning and compliance, estate planning and compliance, investment planning

**Education and Training:**

B.S. Accounting, University of Northern Colorado

**Professional and Civic Activities:**

American Institute of CPAs; Arizona and Colorado Societies of CPAs; Phoenix CFA Society; CFA Institute; East Valley Estate Planning Council; Western Pension & Benefit Conference

## Financial Health Advisory Council



### Charles J. Inderieden

Certified Public Accountant  
**Henry & Horne, LLP**  
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480-483-1170  
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#### Areas of Concentration:

Individual, estate, gift and trust tax planning and compliance

#### Education and Training:

B.S. Accounting, Arizona State University

#### Professional and Civic Activities:

American Institute of CPAs; Arizona Society of CPAs; Central Arizona Estate Planning Council; Scottsdale Estate Planners Study Group; Life Member of EC70, Phoenix Metropolitan Boys & Girls Club; Arizona State University Professional Advisory Committee for the School of Accountancy



### Richard B. Johnson

Principal  
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#### Areas of Concentration:

Investment planning, retirement planning, complex asset allocation strategies, annual budgeting, single-stock strategies, philanthropic gifting, multi-generational financial planning

#### Education and Training:

B.S. Aerospace Engineering, UCLA

#### Professional and Civic Activities:

Central Arizona Estate Planning Council



### James R. Lukes

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480-451-4751  
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#### Areas of Concentration:

Planned giving, trusts/estates, conservatorships, guardianships

#### Education and Training:

Arizona State University; Fresno City College

#### Professional and Civic Activities:

Central Arizona Estate Planning Council; East Valley Estate Planning Council; Phoenix Zoo Advisory Board; Area Agency on Aging; Planned Giving Roundtable



### Barry A. McBride

Life Insurance Agent  
**The Sun Cornerstone Group, Inc.**  
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#### Areas of Concentration:

Estate planning, non-qualified retirement plans

#### Education and Training:

B.A., Grand Canyon University

#### Professional and Civic Activities:

Society of Financial Service Professionals; Million Dollar Round Table Foundation; School Board, Canyon State Academy.

Past Arizona President, National Association of Insurance and Financial Advisors; Past President, Central Arizona Estate Planning Council; Past President, Fellowship of Christian Athletes State Board; Past Board Chair, St. Mary's Food Bank Alliance

## Financial Health Advisory Council



### Denise McClain

Director and Relationship Manager  
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#### Areas of Concentration:

Wealth management, estate planning, trust and estate administration, financial planning

#### Education and Training:

B.S., Accountancy, Arizona State University; J.D., Arizona State University College of Law

#### Professional and Civic Activities:

Past President and Board Member, Susan G. Komen for the Cure Phoenix Affiliate; Steering Committee and Volunteer, Wills for Heroes; Valley Estate Planners; Scottsdale Estate Planners; Phoenix Business Journal Class of 2009 "Forty Under 40"; Crittenton Society Leadership Council, Florence Crittenton; Planned Giving Advisory Committee, Phoenix Zoo



### T. Troy McNemar

Certified Specialist in Estate & Trust Law  
**McNemar Law Offices, P.C.**  
1500 East Bethany Home Road, Suite 105  
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#### Areas of Concentration:

Estate planning, probate, trust and estate administration, guardianships and conservatorships for adults

#### Education and Training:

J.D., University of Kansas School of Law; B.B.A., Washburn University

#### Professional and Civic Activities:

Arizona Endowment Building Initiative; Central Arizona Estate Planning Council; Planned Giving Roundtable; Valley Estate Planners



### Kari R. Meyrose

Attorney at Law  
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#### Areas of Concentration:

Estate planning, probate, business law and real estate

#### Education and Training:

J.D., Loyola University Chicago; B.S., Arizona State University

#### Professional and Civic Activities:

Executive Council - Elder law, Mental Health and Special Needs Planning Section, State Bar of Arizona; Probate and Trust Section, State Bar of Arizona; National Alliance for the Mentally Ill



### Harry A. Papp

Investment Advisor  
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#### Areas of Concentration:

Portfolio and wealth management, general investment advice

#### Education and Training:

B.A., Brown University; M.B.A., University of Chicago; Chartered Financial Analyst

#### Professional and Civic Activities:

Member and Past President, Phoenix Zoo Board; Treasurer, Community Health Charities; Board Member, Blue Cross Blue Shield; Trustee, Arizona State University Foundation; Board of Directors, Arizona State Board of Investment

## Financial Health Advisory Council



### Nihaal M. Rao

First Vice President  
**Merrill Lynch**  
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#### Areas of Concentration:

Retirement planning; investment planning

#### Education and Training:

Bachelor's degree-Economics, University of Arizona; Masters degree-Business Administration, Benedictine University; Masters degree-Science & Financial Services, American College

#### Professional and Civic Activities:

Advisory Board, St. Vincent de Paul; Counselor, Boy Scouts of America; Girl Scouts of America



### Ali N. Rizvi

Senior Partner  
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#### Areas of Concentration:

Wealth accumulation; preservation and succession strategies

#### Education and Training:

B.S., University of Arizona

#### Professional and Civic Activities:

Financial Advisory Council, Mountain Park Health Centre Foundation; National Association of Insurance and Financial Advisors; Million Dollar Round Table (MDRT); Planned Giving Committee Chairman, Phoenix Children's Hospital Foundation; Phoenix Committee on Foreign Relations



### Abbie Shindler

Attorney  
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#### Areas of Concentration:

Estate planning, Corporate, Probate/Trust Administration, Guardianships/Conservatorships

#### Education and Training:

J.D., California Western School of Law

#### Professional and Civic Activities:

Beach Ball Committee, Phoenix Children's Hospital; Professional Advisory Committee and Tax & Legal Seminar Planning Committee, Arizona Community Foundation; Current Tax Discussion Group; Junior League of Phoenix



### Emory J. Smith

Principal  
**EJS Financial Management**  
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#### Areas of Concentration:

Estate planning, retirement planning for professionals, business succession planning

#### Education and Training:

B.S. in Management, Arizona State University

#### Professional and Civic Activities:

President-Elect, National Association of Insurance Advisors-Phoenix; Board member, Central Arizona Estate Planning Council; Student mentor, WP Carey School of Business; Valley Partnership; Urban Land Institute; Make-A-Wish Arizona

## Financial Health Advisory Council



### Trish Stark

Managing Director  
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#### Areas of Concentration:

Banking - Commercial and Private, Investment management and trust

#### Education and Training:

B.A.- Marketing, Arizona State University; MBA, Arizona State University

#### Professional and Civic Activities:

McDowell Sonoran Conservancy Board of Directors, Treasurer;  
AZ Community Foundation - Professional Advisory Board -  
Chair Elect; Catholic Community Foundation - Chair Emeritus;  
Phoenix Children's Hospital - Chair Emeritus



### Mitchell J. Stillman

Managing Director, Investments  
Portfolio Manager  
**Wells Fargo Advisors**  
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480-419-2070  
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#### Areas of Concentration:

Investment planning, Portfolio management and retirement planning

#### Education and Training:

B.A., University of Cincinnati

#### Professional and Civic Activities:

Private Investment Management (PIM) Portfolio Manager; Wells Fargo Premier Advisor Program, a distinction held by a select group of Financial Advisors



### Laura M. Stover

Partner, Attorney  
**Nearhood Law Offices, PLC**  
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480-998-0762  
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#### Areas of Concentration:

Estate planning; probate and trust administration

#### Education and Training:

BS-Political Science, Arizona State University; JD, Golden Gate University School of Law

#### Professional and Civic Activities:

Central Arizona Estate Planning Council; Maricopa County Bar Association; Arizona State Bar Association; American Bar Association; Investment Committee, ASU Women and Philanthropy; Valley Youth Theatre



### Lisa L. Sullivan

Vice President/Sr. Trust Officer  
**TrustBank**  
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#### Areas of Concentration:

Trust and estate administration, estate planning, investment management, financial planning

#### Education and Training:

Business Administration, Rio Salado Community College; Cannon Trust School

#### Professional and Civic Activities:

Central Arizona Estate Planning Council; Arizona Fiduciaries Association; Past Co-Chair, Development Committee-Free Arts

## Financial Health Advisory Council



### J. Darren Wallace

Principal  
**Wild Olive Insurance & Financial Services**  
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480-641-6190  
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#### Areas of Concentration:

Small business owners benefits, individual planning and legacy planning, group benefits and gap management

#### Education and Training:

B.S.-Business Marketing & Minor in Communications and Journalism, Oregon State University

#### Professional and Civic Activities:

Financial Industry Regulatory Authority (FINRA), Million Dollar Round Table (MDRT); Boy Scouts of America



### Keith Wibel, CFA

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#### Areas of Concentration:

Fee-only investment management for individuals, businesses, retirement plans, endowments and foundations

#### Education and Training:

B.S.-Finance, Arizona State University; Graduate Study, University of Michigan Graduate School of Business; Chartered Financial Analyst, CFA Institute

#### Professional and Civic Activities:

Advisor to Student Investment Management Fund, Arizona State University; Investment Committee, Northern Arizona University; Phoenix CFA Society; Scottsdale Estate Planners



### L. Jeannette Wright, CPA

Senior Trust Officer/Sr. Vice President  
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#### Areas of Concentration:

Estate and trust planning, administration of trusts/estates, investment management

#### Education and Training:

B.S. Accounting, Arizona State University; Arizona Certified Public Accountant

#### Professional and Civic Activities:

Arizona Society of CPAs; Past Board Member, The Terraces of Phoenix; Past President, Central Arizona Estate Planning Council; Past President, Valley of the Sun Kiwanis; Member, Valley Estate Planners; Member, East Valley Estate Planning Council