

Scottsdale Healthcare Foundation

Financial Health Advisors - Accountant



Deborah M. Adams

Partner
**Adams, Kvittem-Barr & Assoc.
CPAs, LLP**
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Areas of Concentration:

Accounting and tax, financial planning, business development, business strategic planning

Education and Training:

B.S., Auburn University; MBA, Georgia State University;
Cert. of Advanced Graduate Study, Pace University

Professional and Civic Activities:

Arizona Chairman, National Small Business Advisory Council;
American Institute of Certified Public Accountants; Arizona
Society of Certified Public Accountants; Scottsdale Chamber of
Commerce; Carefree/Cave Creek Chamber of Commerce;
North Scottsdale Chamber of Commerce; Carefree Kiwanis



John A. Gulick III

Director/Wealth Advisor
Harris Private Bank
34525 N. Scottsdale Road
Scottsdale, Arizona 85266
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Areas of Concentration:

Investment management, trust and estate administration,
wealth transfer services, private banking, business banking,
financial planning, lending and credit financing, philanthropic
planning

Education and Training:

B.S., Business Administration, University of Arizona;
J.D., Southern Methodist University

Professional and Civic Activities:

American Institute of Certified Public Accountants; Arizona
Society of Certified Public Accountants; American Bar
Association; Scottsdale Bar Association; Past Chairman,
Scottsdale Judicial Appointments Advisory Board; Past Vice
Chairman, State of Arizona Private Enterprise Review Board;
Past Chairman, STARS Inc.



L. Jane Heist

Certified Public Accountant
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Scottsdale, Arizona 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 Society of Financial Analysts



Charles J. Inderieden

Certified Public Accountant
Henry & Horne, LLP
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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; Valley Estate Planners;
Scottsdale Estate Planners Study Group; Executive Council,
Phoenix Metropolitan Boys & Girls Club

Scottsdale Healthcare Foundation

Financial Health Advisors - Accountant



Denise McClain

Financial Principal

Lowry Hill

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Areas of Concentration:

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:

President, Susan G. Komen for the Cure Phoenix Affiliate; Planned Giving Advisory Council, Ballet Arizona; Volunteer, Wills for Heroes; Valley Estate Planners; Scottsdale Young Estate Planners