

Scottsdale Healthcare Foundation

Financial Health Advisors - Attorney



Meg M. Ekmark

Attorney at Law
Ekmark & Ekmark, LLC
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Areas of Concentration:

Estate planning, trusts and probate

Education and Training:

B.S., J.D., Marquette University

Professional and Civic Activities:

Arizona State Bar, Estate Planning Probate and Trust Section



Donald E. Fergus, Jr.

Attorney at Law
Jennings Strouss & Salmon, PLC
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Areas of Concentration:

Personal estate and business succession planning, probate and trust law

Education and Training:

B.A., University of California Irvine; J.D., California Western School of Law

Professional and Civic Activities:

Arizona Bar Association, Probate and Trust Law Section; California Bar Association, Trusts and Estate Section; Central Arizona Estate Planning Council; Certified Specialist, Estate Planning, Probate and Trust Law, The State Bar of California Board of Legal Specialization



Steven M. Fox

Attorney at Law, LLM in Taxation
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Areas of Concentration:

Estate planning, income tax planning, estate and gift taxation, retirement planning, partnership and corporate taxation, business law and entity formations

Education and Training:

B.A. History, University of Richmond, Virginia; J.D.-Cum Laude, Touro Law Center in Huntington, New York; Master of Law-honors, Taxation, Golden Gate University School of Law, San Francisco

Professional and Civic Activities:

Board of Directors, Kids At Hope; State Bar of Arizona



J. Noland Franz, Esq.

Attorney at Law
Certified Estate & Trust Specialist
The Franz Law Group, PC
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Areas of Concentration:

Estate planning, probate and trust administration, business law-including business exit planning, charitable giving, formation and representation of tax exempt organizations and related litigation

Education and Training:

B.A., University of Kansas; J.D., University of Michigan; MBA, University of Missouri

Professional and Civic Activities:

WealthCounsel, WealthCounsel Advisors; Business Enterprise Institute; Friends of the Scottsdale Public Library; Rotary Club of Scottsdale; Central Arizona Resource Exchange

Scottsdale Healthcare Foundation

Financial Health Advisors - Attorney



John A. Gulick III

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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.



Gregory M. Kruzel

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Areas of Concentration:

Estate planning, charitable planning, business planning, mergers and acquisitions

Education and Training:

B.A., St. Mary's University of Minnesota; J.D., University of Notre Dame

Professional and Civic Activities:

Central Arizona Estate Planning Council; Past Chair, Professional Advisory Board, Arizona Community Foundation; Professional Advisory Board, Jewish Community Foundation; Board of Directors, Phoenix Children's Hospital Foundation; Board of Directors, Xavier Foundation



W. John Lischer

Attorney at Law
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Areas of Concentration:

Estate planning, trust administration

Education and Training:

B.A., Grinnell College; J.D., University of Michigan

Professional and Civic Activities:

Board Member, Sun Valley Lodge; Board member, Ellis Center for Educational Excellence



Denise McClain

Financial Principal
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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

Scottsdale Healthcare Foundation

Financial Health Advisors - Attorney



Mark Moritz

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Areas of Concentration:

Estate planning to clients' individualized, personalized specifications

Education and Training:

B.S., University of Phoenix; J.D., Arizona State University

Professional and Civic Activities:

Planned Giving Round Table; National Council on Planned Giving; Valley Estate Planners; Society of Financial Service Professionals; Probate/Trust Section, Maricopa County Bar Association; Arizona Bar Association



Jean Reed Roberts

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Areas of Concentration:

Estate planning, probate

Education and Training:

B.A. Journalism, University of North Carolina; J.D., Arizona State University

Professional and Civic Activities:

Arizona State Bar Association, Maricopa County Bar Association, Scottsdale Bar Association, Charter 100 of Phoenix, American Association of University Women



Robert J. Rosepink

Attorney at Law
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Areas of Concentration:

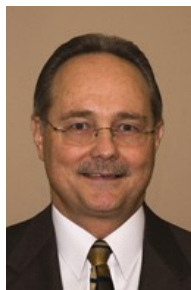
Estate planning, probate and trust law

Education and Training:

B.A. Magna Cum Laude, Amherst College - Phi Beta Kappa;
J.D. Honors, George Washington University

Professional and Civic Activities:

Fellow and Past President, American College of Trust & Estate Counsel; Fellow, American College of Tax Counsel; Academician, International Academy of Estate and Trust Law; Best Lawyers in America; Southwest Superlawyers; Director Emeritus, Scottsdale Healthcare; Trustee Emeritus, Scottsdale Healthcare Foundation



Scott R. Santerre

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Areas of Concentration:

Estate and tax planning, probate and trust law, qualified retirement plans

Education and Training:

B.S. with distinction, Business Administration, Arizona State University; J.D., cum laude, University of San Diego

Professional and Civic Activities:

Arizona and U.S. District Court; District of Arizona; U.S. Tax Court; State Bar of Arizona; Maricopa County Bar Association; Scottsdale Bar Association; Member, 401 Committee; Phoenix Tax Workshop; Tax Law Certified Specialist, Arizona Board of Legal Specialization

Scottsdale Healthcare Foundation

Financial Health Advisors - Attorney



Robert E. Thomson

Attorney at Law
Jekel Howard & Thomson, LLP
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Areas of Concentration:

Estate planning and wealth preservation

Education and Training:

B.A., Occidental College; J.D., University of California Berkeley

Professional and Civic Activities:

Central Arizona Estate Planning Council; Estate Trust and Probate Section, State Bar of Arizona; Trust and Probate Section, Maricopa County Bar Association; Scottsdale Bar Association; Board of Directors, Fountain Hills Sanitary District; Board of Directors, Fountain Hills Chamber of Commerce



Ronald G. Wilson

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Areas of Concentration:

Estate planning

Education and Training:

Undergraduate Degree, Emporia State University;
J.D., Washburn University

Professional and Civic Activities:

Chairman, Terraces of Phoenix Retirement Community; Past Chairman, Arizona State Bar Probate Section; Past Chairman, Central Arizona Estate Planning Council; Past Chairman, Central Arizona Chapter of the Arthritis Foundation; Planned Giving Committee, Phoenix Art Museum; First United Methodist Church; Valley of the Sun YMCA; Valley of the Sun United Way