

Scottsdale Healthcare Foundation

Financial Health Advisors – Financial Planner



Deborah M. Adams

Partner
**Adams, Kvittem-Barr & Assoc.
CPAs, LLP**
P.O. Box 3513
Carefree, Arizona 85377
480-488-5255
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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



Susan S. Brousseau

Senior Vice President
Legacy Bank
15100 N. 78th Way, Suite 101
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480-778-2660
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Areas of Concentration:

Comprehensive financial analysis, including implementation of
estate planning; investment planning; retirement planning;
trust services

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 Chancel Choir



Mary Budzien

Certified Financial Planner
MassMutual
The Dollarhide Financial Group, LLC
17550 N. Perimeter Drive, Suite 450
Scottsdale, Arizona 85255
602-332-7658
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Areas of Concentration:

Business succession planning; estate planning; retirement
planning; life, disability and long term care insurance

Education and Training:

MSN, Arizona State University; BSN, Catholic University; Johns
Hopkins University; BA, Smith College

Professional and Civic Activities:

Board member, Central Arizona Estate Planning; Founder,
McKinstry Foundation for Entrepreneurship, University of
Arizona; Scottsdale Chamber of Commerce; Arizona Business
Brokers



David Carroll

Wealth Coach
Phoenix Wealth Advisors, LLC
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Scottsdale, Arizona 85253
602-689-3330
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Areas of Concentration:

Financial independence/retirement planning, family and social
capital legacy planning, business exit planning

Education and Training:

B.S., Auburn University; MBA, Golden Gate University

Professional and Civic Activities:

Development Leadership Council, KAET; President, Phoenix
Guide Dog Puppy Raisers, Inc.; Development Committee,
Guide Dogs for the Blind

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Stephen Hatcher

First Vice President, Investments
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Scottsdale, Arizona 85253
480-922-6008
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Areas of Concentration:

Financial and estate planning

Education and Training:

BSME, Arizona State University; MBA, University of Phoenix

Professional and Civic Activities:

Instructor at University of Phoenix, Corporate Finance;
Instructor at School of Financial Planning, Investment Theory



Robert L. Jackson

Certified Financial Planner
Jackson Financial Advisors
9590 E. Ironwood Square Drive,
Suite 110
Scottsdale, Arizona 85258
480-609-1055
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Areas of Concentration:

Investment advisors, financial planning, estate and wealth management, retirement planning

Education and Training:

B.S. Finance, Arizona State University

Professional and Civic Activities:

Scottsdale Rotary Club; Scottsdale Chamber of Commerce;
YMCA; Scottsdale Ranch Association; The Financial Planning Association



Jess D. Kravitz

Managing Partner
Securus Financial Group, LLC
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Scottsdale, Arizona 85260
480-659-3850
Email:
jesskravitz@securusfinancialgroup.com

Areas of Concentration:

Retirement and wealth management

Education and Training:

BS Accounting, Quinnipiac College; CFP, College of Financial Planning

Professional and Civic Activities:

Scottsdale Healthcare Foundation Golf Committee



Roman Lopatynski

Investment Advisor Representative
ING Financial Partners
10845 N. 95th Place
Scottsdale, Arizona 85260
480-614-5445
Email: romanl@qwest.net

Areas of Concentration:

Fee-based investment management

Education and Training:

BSEE, University of Illinois

Professional and Civic Activities:

Financial Planning Association

Scottsdale Healthcare Foundation

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Barry A. McBride

Life Insurance Agent
The Sun Cornerstone Group, Inc.
9929 N. 95th Street, Suite Q110
Scottsdale, Arizona 85258
602-808-9008, ext. 21
Email: bamcbride@cox.net

Areas of Concentration:

Estate planning, non-qualified retirement plans

Education and Training:

B.A., Grand Canyon University

Professional and Civic Activities:

Board Chairman, St. Mary's Food Bank Alliance; Society of Financial Service Professionals; Million Dollar Round Table Foundation; Past President, National Association of Insurance and Financial Advisors; Past President, Central Arizona Estate Planning Council; Past President, Fellowship of Christian Athletes State Board



Denise McClain

Financial Principal
Lowry Hill
6730 N. Scottsdale Road, Suite 240
Scottsdale, Arizona 85253
480-905-9248
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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



Ron Saffer, CLU

Investment Advisor Representative
Registered Principal FINRA
Saffer Wealth Strategies
531 E. Osborn Road
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602-263-8787 Cell: 602-228-2121
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Areas of Concentration:

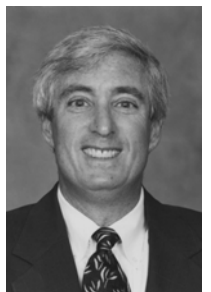
Fee-based asset management and consulting, a licensed investment advisory firm; charitable, estate and business planning, retirement planning, self-directed IRAs and comprehensive financial planning

Education and Training:

Finance and Accounting, University of Arizona; CLU, American College Bryn Mawr

Professional and Civic Activities:

NAIFA; Planned Giving Round Table; Member of Hall of Fame and Past President, Society of Financial Service Professionals; Central Arizona Estate Planning Council and Past President; Chairman Foundation Trustees and Board Life Director, Phoenix Boys & Girls Club; Board, Junior Golf Association of AZ; Foundation Trustee, Valley Presbyterian Church



Mitchell J. Stillman

Managing Director, Investments
Portfolio Manager
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Areas of Concentration:

Portfolio management and asset allocation services for retirement plans and high net worth investors, with particular attention to tax ramifications

Education and Training:

B.A., University of Cincinnati

Professional and Civic Activities: