

# Scottsdale Healthcare Foundation

## *Financial Health Advisors – Stockbroker/Investment Advisor*



### **Stephen Hatcher**

First Vice President, Investments  
**UBS Financial Services Inc.**  
8501 N. Scottsdale Road, Suite 100  
Scottsdale, Arizona 85253  
480-922-6008  
Email: stephen.hatcher@ubs.com

#### ***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 W. Hollinger**

Vice President, Wealth Management  
Advisor  
**Merrill Lynch Private Client Services**  
23350 N. Pima Road  
Scottsdale, Arizona 85255  
480-513-2200  
Email: robert\_hollinger@ml.com

#### ***Areas of Concentration:***

Portfolio management, wealth management advisory, financial  
planning

#### ***Education and Training:***

BSB, Emporia State University-Kansas; Certified Financial  
Planner

#### ***Professional and Civic Activities:***

Past Foundation Board, St. Barnabas on the Desert; Past  
Officer, The Wildest Club in Town, Phoenix Zoo; The Heard  
Museum



### **Robert L. Jackson**

Certified Financial Planner  
**Jackson Financial Advisors**  
9590 E. Ironwood Square Drive,  
Suite 110  
Scottsdale, Arizona 85258  
480-609-1055  
Email: rjackson@jacksonadvisors.com

#### ***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



### **Richard B. Johnson**

Vice President  
**Bernstein Global Wealth  
Management**  
5101 E. Calle Redonda  
Phoenix, AZ 85018  
602-618-9721  
Email: richard.johnson@bernstein.com

#### ***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; New Song Center For  
Grieving Children and Those Who Love Them

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## **Barry A. McBride**

Life Insurance Agent  
**The Sun Cornerstone Group, Inc.**  
9929 N. 95<sup>th</sup> 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



## **Harry A. Papp**

Investment Advisor  
**L. Roy Papp & Associates, LLP**  
2201 E. Camelback Road,  
Suite 227B  
Phoenix, Arizona 85016  
602-956-0980  
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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; Certified Financial Analyst

### ***Professional and Civic Activities:***

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



## **Ron Saffer, CLU**

Investment Advisor Representative  
Registered Principal FINRA  
**Saffer Wealth Strategies**  
531 E. Osborn Road  
Phoenix, Arizona 85012  
602-263-8787 Cell: 602-228-2121  
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### ***Areas of Concentration:***

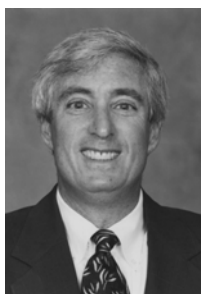
Fee-based asset management and consulting, a licensed investment advisory firm; charitable, estate and business planning, retirement planning, self-directed IRAs and comprehensive financial planning

### ***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  
**Wachovia Securities, LLC**  
20551 N. Pima Road, Suite 200  
Scottsdale, Arizona 85255  
480-419-2070  
Email: mitchell.stillman@wachoviasec.com

### ***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:***