

Scottsdale Healthcare Foundation

Financial Health Advisors – Trust Officer/Private Banker



L. Jeannette Arthur

Senior Fiduciary Officer-Estates
JP Morgan Private Client Services
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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

Professional and Civic Activities:

Past President, Central Arizona Estate Planning Council; Past President, Valley of the Sun Kiwanis; Arizona Society of CPAs



Gail Bradley

Vice President, Wealth Strategist
Northern Trust, NA
7600 E. Doubletree Ranch Road,
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Scottsdale, Arizona 85258
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Areas of Concentration:

New business development; financial planning; investment, estate and administrative solutions

Education and Training:

B.A., University of Arizona; Master of Counseling, Arizona State University; Securities licenses: Series 7 & 66

Professional and Civic Activities:

Desert Botanical Board; Scottsdale Public Art Board; ASU Women in Philanthropy; Past Chairman, Scottsdale Cultural Council Board. Past Member: Valley Leadership XVI; Herberger Theater Center Board; Scottsdale Boys and Girls Club Board; Jewish Federation Foundation Professional Advisory Committee; Arizona Community Foundation Advisory Board



Teresa Coin

Vice President
M&I Wealth Management
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Areas of Concentration:

Trust and estate administration, estate planning, fiduciary taxation

Education and Training:

B.A., University of New Mexico; JD, Wake Forest University School of Law; LL.M., University of Miami School of Law

Professional and Civic Activities:

Central Arizona Estate Planning Council; Scottsdale Bar Association; Planned Giving Round Table of Arizona; Paradise Valley Estate Planning Group



John A. Gulick III

Director/Wealth Advisor
Harris Private Bank
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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.

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Financial Health Advisors – Trust Officer/Private Banker



F. Harlan Loffman

Senior Vice President/Regional Trust Manager
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Areas of Concentration:

Trust administration, estate planning, financial planning

Education and Training:

B.A., Kent State University; J.D., The Ohio State University;
Pacific Coast Banking School, University of Washington

Professional and Civic Activities:

Life Director, Fiesta Bowl; Financial Planning Association; State Bar of Arizona; Maricopa County Bar Association; Board of Directors, Planned Giving Roundtable; Planned Giving Committee, Phoenix Children's Hospital; Vice President, Board of Directors, The Father Wasson Legacy Endowment, Inc.



Michael K. McCartney

Manager, Wealth Management Group
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Areas of Concentration:

Wealth management

Education and Training:

B.S., M.B.A., Arizona State University

Professional and Civic Activities:

Treasurer and Past Chairman, Gompers Center for the Handicapped; Member and Past President, Central Arizona Estate Planning Council



Denise McClain

Financial Principal
Lowry Hill
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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



Edward L. Plotkin

Vice President
MidFirst Private Bank
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Scottsdale, Arizona 85255
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Areas of Concentration:

Wealth management, trust administration, credit solutions, concierge-style banking services

Education and Training:

B.A. Economics, University of Arizona

Professional and Civic Activities:

Founding member, Arizona Chapter of the National Association of Corporate Directors; Valley of the Sun JCC; Board Member, Friends of Public Radio Arizona; Men's Board Member, Fresh Start Women's Foundation; Youth Sports

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Financial Health Advisors – Trust Officer/Private Banker



Frederick A. Schertenlieb

Vice President, Business Dev. Officer

Arizona Bank and Trust

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Phoenix, Arizona 85016

602-381-2066

Email: fschertenl@aol.com

Areas of Concentration:

Trust and estate planning, fee-based investment management, private banking (lending), personal banking/deposit products

Education and Training:

BBA, Western Michigan University; MBA, Northwestern University

Professional and Civic Activities:

Central Arizona Estate Planning Council; Canada Arizona Business Council