

Accountants

Jeff Belingheri, CPA

Bregante + Company, LLP, 330 Ignacio Blvd., Suite 201, Novato, CA 94949

Phone: 415.883.4262 *Fax: 415.883.4290*

Website: www.bcocpa.com

Email: jbelingheri@bcocpa.com

Description of Business: CPA Firm providing tax, accounting, audit and consulting services to closely held businesses, high-net-worth individuals and nonprofit organizations throughout the greater Bay Area.

Personal Background: Jeff Belingheri has been a CPA since 1993 and is member of the CA society of Certified Public Accountants and the American Institute of Certified Public Accountants. He holds a Master of Science in Taxation from Golden Gate University in San Francisco and a Bachelor of Business Administration in Finance from California Polytechnic State University in San Luis Obispo.

Claude J. Bishop, CPA

Claude J. Bishop, CPA, Inc., 201 Tamal Vista Blvd., Corte Madera, CA 94925

Phone: 415.924.6576 *Fax: 415.924.6646*

Email: claudio@cjbishopcpa.com

Description of Business: In addition to his accounting practice, Claude is a registered investment advisor representative, (series 7) working with NFP Securities Inc., and a securities principal (series 24). Claude is also a California licensed general life agent and a licensed real estate agent.

Personal Background: Claude is a graduate of U.C. Berkeley. He enjoys running, golf, and the family dog, Elvis. Claude has two adult children and currently resides in San Rafael with his wife Peggie.

David J. Clark, JD, CPA

Boerio and Company, CPAs, 353 Bel Marin Keys Blvd., Ste. 1, Novato, CA 94949

Phone: 415.883.3700 *Fax: 415.883.3057*

Website: www.boerio.com

Email: Dave.Clark@boerio.com

Description of Business: Dave has over 30 years of experience in estate, gift and trust matters and worked for both the IRS and Arthur Andersen & Co. He is active in the American Bar Association Section of Taxation, and is a Commissioner from California to the National Conference of Commissioners on Uniform State Laws.

Personal Background: Dave graduated from Stanford University and the University of San Francisco School of Law. He is a Supernumerary with San Francisco Opera and is studying to become a Licensed Battlefield Guide at Gettysburg National Military Park.

Stephen J. Delahunty, CPA

Delahunty Accountancy Corporation, 1500 Grant Avenue, Ste. 200, Novato, CA 94945-3131

Phone: 415.898.5300 *Fax: 415.892.5727*

Website: www.delahuntycpa.com

Email: steve@delahuntycpa.com

Description of Business: Full service CPA firm providing income tax and estate tax planning and preparation, complex accounting services.

Personal Background: MBA Tax, Golden Gate University; BS Accounting, University of San Francisco; CPA in Marin County since 1975.

Joni Fritsche, CPA

Burr Pilger Mayer, Inc., 110 Stony Point Rd., Ste. 210, Santa Rosa, CA 95401

Phone: 707.524.6529 *Fax: 707.544.2190*

Website: www.bpmcpa.com

Email: jfritsche@bpmcpa.com

Description of Business: As a CPA, I have worked with many types of individual and business clients, but have specialized in planning and tax compliance for estates, trusts, and high net worth individuals for the last 15+ years.

Personal Background: I have practiced as a CPA for 26 years, currently as a Tax Director, and am an Accredited Estate Planner through NAEPC.

Margaret Grover, CPA

Ghirardo, CPA, 22 Willow Lane, Sausalito, CA 94965

Phone: 415.599.4642 *Fax: 415.897.5030*

Website: www.ghirardocpa.com

Email: mgrover@ghirardocpa.com

Description of Business: CPA with a practice including estates, trusts, and individuals. Lots of experience helping clients with estate administration.

Personal Background: 21 years in public accounting (8 with the Big 5). Before that, was a bookkeeper, lived on a ranch and had horses.

Thomas A. Jacobsen, CPA

Perotti and Carrade, CPA's, 1100 Larkspur Landing Cir., Ste. 358, Larkspur, CA 94939

Phone: 415.461.8500 *Fax: 415.461.6342*

Website: www.pc-cpas.com

Email: tom@pc-cpas.com

Description of Business: Tax & Accounting for Estates, Trusts, Family LPs, Corporations, LLCs. Industries served: Real Estate, Professional Services, Law Firms, Oil & Gas; Estate & Gift Tax Returns.

Personal Background: CPA since 1974; AICPA, Calif. Society of CPAs member. MBA Taxation, Golden Gate University; BA, U.C. Berkeley, Phi Beta Kappa. Marin County resident since 1974. Married, two children.

Robert A. Kosbie, CPA

RINA Accountancy Corporation, 100 Montgomery St., Ste. 2075, San Francisco, CA 94104

Phone: 415.777.4488 *Fax: 415.777.0680*

Website: www.rina.com

Email: rkosbie@rina.com

Description of Business: Our values-based approach inspires trust and confidence that your unique estate planning and legacy goals are incorporated into your plan. We take the worry out of estate planning and instill peace of mind that your objectives are fulfilled.

Sandy Magid, CPA, PFS, AEP

Magid Accountancy Corporation, APC, 10 Commercial Blvd., Novato, CA 94949

Phone: 415.883.9300 *Fax: 415.883.9169*

Email: smagid@magidcpa.com

Description of Business: CPA and Financial Services for small- to mid-size business owners during their periods of wealth accumulation, retention & maintenance, including estate planning, business consulting, tax planning and preparation, & forensic accounting matters. Practice includes investment management, Tenant in Common investments, mortgage and loan factoring facilitation.

Personal Background: Sandy Magid began his career in 1966 as an audit and tax specialist with a national CPA firm, later serving as a financial manager with an international manufacturing corporation. His background includes serving as an aide to President Gerald R. Ford and as a part-time college instructor.

Thomas E. Martz, CPA

Eckhoff Accountancy Corporation, 145 North Redwood Drive, San Rafael, CA 94903

Phone: 415.499.9400 *Fax: 415.499.1408*

Website: www.eckhoff.com

Email: tomm@eckhoff.com

Douglas G. Paul, CPA

Ghirardo, CPA, 7200 Redwood Blvd., Ste. 403, Novato, CA 94945

Phone: 415.599.4644 *Fax: 415.897.5030*

Website: www.dougspaul.com

Email: doug@dougspaul.com

Description of Business: Doug has been an independent contractor to Ghirardo CPA since 2004, and continues to serve his clients with the expanded staffing of this larger organization. For 20 years before that, he owned his own CPA firm where he specialized in the tax areas of closely held businesses, real estate, trust, estate and family wealth planning. He provides his clients with referrals to a network of professional contacts, bankers, attorneys, stockbrokers, insurance agents, etc., as part of his services.

Personal Background: BA in Economics and MBA in Finance from UC Berkeley; Masters in Taxation, Golden Gate University. Past President of Marin County Estate Planning Council, is on the Board Emeritus of the Marin branch of the S.F. YMCA, and has served on the Redwood High School Scholarship Foundation. Past Chair of the Mill Valley Schools Community Foundation, and former board member of Big Brothers/Big Sisters of Marin, Inc.

Marc Samborski, CPA

Perotti and Carrade, 1100 Larkspur Landing Cir., Ste. 358, Larkspur, CA 94939

Phone: 415.461.8500 *Fax: 415.461.6342*

Website: www.pc-cpas.com

Email: marcsam@pc-cpas.com

Stephen R. Stanfel, CPA

Calegari & Morris, 123 Mission St., 18th Fl., San Francisco, CA 94105

Phone: 415.955.0305 *Fax: 415.981.1124*

Website: www.calegariandmorris.com

Email: sstanfel@calegariandmorris.com

Description of Business: Tax and Business consultant to closely held mid-size businesses in the Bay Area.

Personal Background: Riordan H.S. in San Francisco, USF '82. Olympic Club member, Community Awareness and Treatment Services, Inc. (nonprofit), Board Member, Treasurer and Financial Committee Chair. Active in sports.

Constance Vandament, CPA

Vandament Accountancy Corp., 700 Larkspur Landing Cir., Ste. 140, Larkspur, CA 94939-1710

Phone: 415.461.4644 *Fax: 415.461.4649*

Website: www.vandament.com

Email: connieV@vandament.com

Description of Business: Over 25 years of service to a diverse mix of clients. Estate tax returns, trust administration, individual and business tax expertise.

Personal Background: University of Oregon; Golden Gate University. Former Council president.

Art Wasserman, CPA

Wasserman & Kleinfeld, LLP, 755 Baywood Dr., Ste. 196, Petaluma, CA 94954

Phone: 707.778.1320 *Fax: 707.778.1321*

Website: www.wkcpas.com

Email: art@wkcpas.com

Description of Business: Full service CPA firm specializing in individual tax, business entity selection business tax & estate tax.

Personal Background: UCLA graduate 1965. Partner CPA firm over 30 years. Former Rotary Club President, past Board Member of the Marin Symphony, Amigos de las Americas, San Anselmo Co-op, Marin Tennis Club. Thirty-five-year resident of Marin County. Married 35 years with two adult children. Able to relate well with estate planning clients with real ability to demystify the process.