

Fiduciaries

Theresa J. Aman

Bank of Marin, 504 Redwood Blvd., Ste. 100, Novato, CA 94947

Phone: 415.884.3025 *Fax: 415.884.9493*

Email: theresaaman@bankofmarin.com

Description of Business: Client service officer, client liaison operations, real estate, estate settlement and appraisals.

Personal Background: Married to Dale Aman; 3 children and 3 grandchildren.

Debra Brusatori, CTFA, AEP

S. Brown and Associates, 170 San Marin Dr., Novato, CA 94945

Phone: 415.730.2831

Email: Debra.Brusatori@cnb.com

Description of Business: Vice President and Senior Trust Officer

Personal Background: 22 years BNY Mellon; 14 years Bank of America.

Cynthia D. Cannam, CTFA

Exchange Bank, P.O. Box 208, Santa Rosa, CA 95402-0208

Phone: 707.522.2372 *Fax: 707.579.4592*

Website: www.exchangebank.com

Email: cannamc@exchangebank.com

Description of Business: 15 years of experience; MCEPC member since 2001. Assist clients in planning for their and their family's financial future. Exchange Bank can act as trustee or agent when an individual is no longer willing or able to do so.

Personal Background: Graduate of UC Davis, Bachelor of Science Degree, Managerial Economics. CTFA designation in 2001.

Dana M. Conklin

Fiduciary Advantage, 4460 Redwood Hwy., Ste. 16-229, San Rafael, CA 94903

Phone: 415.462.0885 *Fax: 415.491.1133*

Website: www.fiduciaryadvantage.com

Email: dana@fiduciaryadvantage.com

Gloria Kosbie, CPA

Kosbie Trust & Fiduciary Services, P.O. Box 937, Mill Valley, CA 94942

Phone: 415.729.9188 *Fax: 415.887.9918*

Email: gloria@fgsystems

Description of Business: I work with families and other professionals to provide client-centered solutions for families with loved ones who are unable to care for themselves on a personal or financial level by stepping in to

provide trust and estate administration, power of attorney services, and personal CFO services.

Personal Background: I bring 20 years of experience working with clients, first in public accounting and later as a fiduciary solving their tax, business and wealth management needs. I am married with three grown children. I enjoy hiking, watching good movies and reading.

Caron Schmierer

Fiduciary Resources, Inc., 1120 Nye St., Ste. 320, San Rafael, CA 94901

Phone: 415.459.3486 *Fax: 415.258.1821*

Email: gsl2@aol.com

Kim Schwarcz

Kim Schwarcz, Fiduciary, 22 Seawolf Passage, Corte Madera, CA 94925

Phone: 415.924.1711 *Fax: 415.924.6878*

Email: kim@schwarczfiduciary.com

Description of Business: Conservatorships, trusts, case management, and estate administration.

Vera E. Sprinkel, CTFA

Sprinkel Fiduciary Services, P.O. Box 5087, Larkspur, CA 94977

Phone: 415.461.2110 *Fax: 415.461.3670*

Email: vsprinkel@sbcglobal.net

Description of Business: Private fiduciary specializing in trust and estate administration, agent for executor or trustee and consulting services to individuals and nonprofits.

Personal Background: Extensive background in Trust and Estate Administration with several major bank trust departments handling complex client relationships. In 2002, Vera established Sprinkel Fiduciary Services and is now a CA Licensed Professional Fiduciary.

Carol E. Young, CTFA

Bank of Marin, 504 Redwood Blvd., Ste. 100, Novato, CA 94947

Phone: 415.884.3023 *Fax: 415.884.9493*

Website: www.bankofmarin.com

Description of Business: Full spectrum of wealth management and corporate trustee services for individuals and businesses.

Personal Background: Over 18 years of trust administration experience. Holds a degree from Webster University and is a Certified Trust and Financial Advisor. Volunteers for a variety of local nonprofits in Marin County.