

Insurance

Richard J. Boyer, CLU, ChFC

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Robert E. Burton, LLB, CLU, AEP, ChFC

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Description of Business: Primarily through the use of life insurance and related products, efficiently structured for income, gift, and estate tax purposes, I help create programs that protect individuals, families, estates, and businesses.

Personal Background: B.S. in Economics, Yale University; LLB, Columbia Univ. Law School.

Immediate past Board member, NAEPC; Accredited Estate Planner through NAEPC; Advanced Planning guru for New York Life for many years; V.P. of Management Compensation Group/SF.

Re-affiliated with New York Life in 1990 and later became a principal of The Silver Group, which joined Provada Insurance Services in 2006. Bob is a frequent speaker, lecturer and writer on estate planning, planned philanthropy, deferred compensation, and insurance topics.

Fred Kanter

Fred Kanter, CLU, ChFC, AEP, 2265B Mar East St., Tiburon, CA 94920

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Business Description: Business and estate planning, individual and group life, disability, medical, annuities, and long-term care.

Personal Background: Chartered Life Underwriter; Accredited Estate Planner; Certified in Long-Term Care.

Donald A. Kline

Don Kline Financial & Insurance Services, Inc., 200 Edgewood Ave., Mill Valley, CA 94941

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Personal Background: Don Kline, CLTC, has served as President of the Marin County Estate Planning Council. He is a certified specialist in long-term care insurance and has been an independent agent in the life and long-term disability insurance field for the past 30 years. He brings a solid understanding of the significant role that long-term care and life insurance play in the estate planning process.

Krystalynn M. Schlegel, CLU, ChFC, CLTC

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Description of Business: I specialize in business succession & estate planning, implementation of programs and products that enhance tax advantaged exit strategies, business continuity and succession and multi-generational wealth transfer.

Personal Background: B.S., Business, Oregon State Univ. Entered the life insurance industry in 1971 and held a variety of positions including agent, field management and executive with major insurance company. CLU, 1977; ChFC, 1983; AEP, 2008. In 1988 formed Capital Advisors.

Member, Exceptional Producers Program for Crump Ins. Svcs Potomac. Past President., MCEPC; Chairman of Planned Giving Committee, Novato Community Hospital.

Member NASD, MAEPC, MDRT Top of the Table and Int'l Forum. Married, lives in Novato. Two adult daughters; two grandchildren.

Matthew Taddei, CLU, CFP®

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Description of Business: We are a local boutique wealth advisory firm with specialties in investment management, financial planning, and insurance brokerage. Our firm utilizes a team approach in helping our clients achieve their financial goals.