Financial Planners

Edi Alvarez, CFP®

Aikapa Wealth Planning & Management, 1 Cedar Ave., Kentfield, CA 94904
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Description of Business: AIKAPA is an independent fixed-fee financial planning and wealth management firm dedicated to helping our clients stay on top of their financial health without compromising those ever-important career and social goals. We are passionate about what we do--building a sound financial infrastructure while fostering solid financial habits for our clients through education and successful experiences.

Personal Background**:** Edi Alvarez is a certified financial planner and investment manager. She was an educator, executive and entrepreneur before joining the financial planning field. Edi lives with her spouse in Kentfield. She loves to run, hike, archer and read. She shares her commitment to financial literacy with community groups through workshops and 'talking' sessions. She also contributes 'relevant' financial planning ramblings in her column published in a national women's magazine.

Herbert Foedisch, CFP®

Northwestern Mutual, One Eleven Sutter St., Ste. 1800, San Francisco, CA 94104
Phone: 415.733.6571 *Fax: 415.395.9120*
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Description of Business: We help prepare successful people for life after work.

Personal Background: Active as a volunteer for the YMCA and enjoy sailing and cycling.
Board member, Saint Vincent de Paul, San Rafael.

Joyce L. Franklin, CPA, CFP®

JLFranklin Wealth Planning, 900 Larkspur Landing Cir., Ste. 185, Larkspur, CA 94939
Phone: 415.925.3400 *Fax: 415.925.3401*
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Description of Business: JLFranklin Wealth Planning provides individualized financial life planning and wealth management services. As a firm with a strong tax background, we often suggest effective tax-planning techniques that result in substantial tax savings for our clients. We customize our services for each client, coordinating specific financial resources with goals, risk tolerance and lifestyle.

Personal Background: Over two decades of accounting experience and over 10 years of experience as a personal financial planner. An alumna of Deloitte and Ernst & Young, Ms. Franklin has been principal of JLFranklin Wealth Planning since 1998. Degrees include a Graduate Certificate in Personal Financial Planning, UC Berkeley; Masters in Taxation from San Francisco State; B.S. in Commerce from the University of Virginia.

Stephen Gandy, CFP®

Foothill Securities, Inc., 30 Professional Ctr. Pkwy., Suite B, San Rafael, CA 94903
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Description of Business: Wealth Management & Financial Planning issue resolution for pre- & post-retirees.

Personal Background: Over 15 years' planning experience. Certified Financial Planner; Series 7. B.A., Economics, University of California.

Theodore S. Jablonski, CFP®

Merrill Lynch Global Wealth Management, 600 California St., San Francisco, CA 94108
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Description of Business: Visit www.ml.com/ted_jablonski to access my professional qualifications and primary business focus.

Jeff Kragel, CFP®, CPA

Bernstein Global Wealth Management, 555 California St., Ste. 4300, San Francisco, CA 94104
Phone: 415.217.8026 *Fax: 415.217.8111*
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Description of Business: Jeff is a financial planner with Bernstein Global Wealth Management. Jeff's practice is focused on providing investment planning and management services for high net worth individuals, families and small businesses. Plans are tailored according to each client's resources, tax circumstances, estate planning goals and risk tolerance, with the goal of maximizing after-tax returns using the appropriate asset allocation. Prior to joining Bernstein, Jeff was a CPA with Ernst & Young, working in their Biotech practice. Jeff is also a Certified Financial Planner.

Ronald W. Murphy, CLU, ChFC

Larkspur Financial Advisors, 100 Tamal Plaza, Suite 110, Corte Madera, CA 94925
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Laurie Nardone, CFP®

Shira Ridge Wealth Management, 4306 Redwood Hwy., Ste. 100B, San Rafael, CA 94903
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Description of Business: People start working with Shira Ridge because they are ready to take control of their future and are tired of living with financial angst. People stay with Shira Ridge because of our unwavering commitment to the ongoing success of our clients--helping them to reach their personal "summit."

Personal Background: In 2000, Ms. Nardone left her 20+ years of corporate management to establish

Shira Ridge Wealth Management. The name evolved after her personal journey in 2005 to Africa to summit Mt. Kilimanjaro. She is a Certified Financial Planner professional and holds Series 7, 24, 39 and 63 registrations. She has her own RIA (Registered Investment Adviser), is a Registered Representative with Genworth Financial Securities Corp., and an Investment Adviser Representative with Genworth Financial Advisers Corp. She is also an active member within the Financial Planning Association (FPA), and a past president of the San Francisco FPA Chapter.

Fredric Postle, RIA

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Description of Business: For over 25 years I've helped successful individuals and private businesses plan in the areas of asset protection and transfer planning.
Personal Background: MBA MS Taxation. Enjoy skiing, golf, jazz piano.

C. Joseph Ramos

Private Capital Management, Inc. 900 Larkspur Landing Cir., Ste. 240, Larkspur, CA 94939
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Description of Business: Joe is the CEO of Private Capital Management, Inc., an RIA responsible for client portfolio management services [min. a/c size $1,000,000].
Personal Background: Joe lives in Mill Valley and has three children. Graduated in 1982 from UC Berkeley Business School; CPA at Arthur Andersen [3 yrs.]; Montgomery Securities [2 yrs.]; then last 20 years in wealth management. Listed as one of the "Nation's 100 Most Exclusive Wealth Advisors" by Robb Report Worth; "Top 50 Wealth Advisors in U.S." by Bloomberg; and "Who's Who in America."

Thomas J. Scheffler

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Description of Business: Provides comprehensive financial planning and investment advisory services; tax planning, investment management, estate planning, retirement planning and risk management.
Personal Background: M.S. Investments, Golden Gate University; M.B.A. -Taxation, Golden Gate University Award for Professionals in Taxation; UCLA Professional designation in personal financial planning, UCLA.

Peter Tabet, CLU, ChFC, AEP

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Jacquelin R. Thomson, EA, CFP®

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Description of Business: Jackie Thomson, EA, CFP, is a partner in Anspach Financial Group in San Rafael, where she provides fee-only financial planning and tax advisory services.
Personal Background: An enrolled agent since 1987, she has practiced in Marin County for most of 20+ years. In 1997, she took a new career path into the financial services industry. As a brokerage firm representative with AXA Advisors, she provided investment account services which included the establishment and servicing of small business retirement plans. Later, as Director of Financial Education with Fremont Investment Advisors, she managed a comprehensive financial education program for Bechtel retirement plan participants and retirees. Today, she enjoys integrating her planning skills into her tax practice as she helps her clients prepare for retirement and deal with other financial issues.

Thomas Tracy, CFP®, CFA

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Description of Business: Aspiriant is the leading independent wealth management firm dedicated to delivering integrated, objective strategies that address the unique needs of wealthy families and individuals. We bring clarity and solutions to our clients to help them achieve their goals.
Personal Background: I am a financial planner with over 20 years of experience providing personal financial planning to individuals, executives, and business owners. I was born and raised in Sausalito and have lived in Marin most of my life. I'm an avid runner and participate in the annual Dipsea race.