FPA Far West Roundup

2014 Speaker Bios

Don St. Clair, CFP®, AIF®

Certified Financial Planner™ and Registered Investment Adviser helping self-employed professionals and California Educators build sustainable wealth, reduce income taxes, and pay off their debt so they can enjoy a worry-free retirement.

Donald L. Sinclair, CFP® & MortgageNudge
Roseville, CA
PH- 916.677.4282
www.linkedin.com/in/donstclair
invest@donstclair.com

Wade D. Pfau, PhD, CFA

Professor of Retirement Income for the PhD program at The American College. He is a past selectee for the *Investment News* Power 20, for people expected to shape the financial advisory industry and is a recipient of *Financial Planning* magazine's Influencer Awards.

The American College
270 South Bryn Mawr Avenue | Bryn Mawr, PA 19010
PH- 610.526.1569
http://www.theamericancollege.edu
http://wpfau.blogspot.com
wadepfau@gmail.com

Brandon Odell, CFA

As director of business consulting, Brandon works directly with clients on strategy development, growth planning , equity assessment and transfer. He also serves as faculty for the Ensemble Management Institute, the company's intensive program of business management classes for independent advisory firms.

The Ensemble Practice
1914 N. 34th Street
Seattle, WA 98103
PH: 206.257.3283
http://www.ensemblepractice.com
Brandon@ensemblepractice.com

FPA Far West Roundup

2014 Speaker Bios

Michael F. Kay, CPA, CFP®

Michael founded Financial Life Focus to put client success and life balance in the forefront of his practice. He studied with life planning pioneers Carol Anderson and George Kinder. Inspired by what he learned, he explored and tested new methodologies, adopted those he considered to be the best and created a paradigm shift in his own practice.

Financial Life Focus
70 South Orange Ave., Ste 245
Livingston, NJ 07039
PH- 973.533.0666
www.financial-focus.net
http://www.psychologytoday.com/blog/financial-focus

Timothy A. Barnthouse, CPA

Timothy is managing Tax Partner of the firm and is widely experienced in developing tax planning structures and strategies to mitigate or tax-optimize business transactions. He has extensive experience in audit representation before the IRS, FTB and Board of Equalization.

Barnthouse & Associates LLP
Certified Public Accountants
9 Corporate Park, Suite 130
Irvine, CA 92606
PH- 949.777.8814
www.socalcpas.com
Tim@socalcpas.com

Mark L Prendergast CPA, CFP®

Mark has 30 years experience in the financial services industry. He has been a CPA since 1982, having worked 6 years with the international accounting firms of Price Waterhouse and Ernst & Young. He acquired his Certified Financial Planner™ designation in 1988.

Inspired Financial LLC
5011 Argosy Ave Suite 7
Huntington Beach CA 92649-1002
Ph-714.971.0663
www.InspiredFinancial.biz
mark@InspiredFinancial.biz

FPA Far West Roundup

2014 Speaker Bios

Ray Scheffield, JD, LLM

Ray is a well known speaker in the Tax and Estate Planning area. He focuses his practice in all aspects of trusts, estate planning, probate and trust administration, tax and business planning. Raymond's guiding concern is to give clients clear and straightforward advice on complex areas of the law.

Sheffield Law Office
25 Metro Drive, Suite 600
San Jose, California 95110
PH- 408.920.2500
http://www.sheffieldestateplanning.com
raymond@sheffieldestateplanning.com

Peter W. Johnson, Jr., PFP

Peter is founder of PWJohnson Wealth Management, a Registered Investment Advisory firm based in Los Altos, California. His independent firm provides investment and financial planning services to clients who seek to maximize their long-term financial health.

PWJohnson Wealth Management
2051 Grant Road, Suite 240
Los Altos, CA 94024
PH- 408.747.1222
http://www.pwjohnson.com
blog.pwjohnson.com
peter.johnson@me.com

Maureen O'Connell , JD

Maureen brings personal focus to the complex and sensitive estate planning process. With over thirty years of experience and education, she provides peace of mind for her clients as they navigate the complex rules that govern wills and trusts.

Law Office of Maureen O'Connell
999 W. Taylor St., Suite B
San Jose, CA 95126
PH- 408.297.6004
www.linkedin.com/pub/maureen-oconnell/1b/877/608
moc@moclaw.org

FPA Far West Roundup

2014 Speaker Bios

Nancy Ross, LCSW

Over the years, I've been trained in a number of therapeutic approaches but whether it's cognitive-behavioral, interpersonal, communication skills/problem-solving, family systems/work systems, hypnosis or mindfulness, I believe that the most important part of coaching and counseling is making sure that whatever approach is used, it fits the needs of the individual, couple or family.

Bauer Shepherd & Ross Counseling Services
10455 Torre Avenue
Cupertino, CA 95014
PH- 408.973.1001
http://www.bsrcounselingservices.com
nanjross@yahoo.com

Dave Yeske, PhD, CFP®

Dave earned a doctorate in finance at Golden Gate University and an M.A. in Economics from the University of San Francisco. He co-authored with Elissa Buie, CFP, "Policy-Based Financial Planning Provides Touchstone in a Turbulent World", which was published in *The Journal of Financial Planning*. Buie and Yeske's most recent paper, "Evidence-Based Financial Planning: To Learn . . . Like a CFP" appeared in the November 2011 issue of the Journal.

Yeske Buie , Managing Director
220 Montgomery Street, Suite 900, San Francisco, CA 94104
PH- 415.956.9686
www.YeBu.com
dave@yebu.com

Roberta Lee-Driscoll, CFP®

Roberta has helped hundreds of people get a grip on their finances, explaining skills and routines that clients can use to cut expenses, pay off debt and increase retirement savings. "For me this whole financial- planning thing is teaching skills," said Lee-Driscoll. "My favorite line is 'I'm not your mother, I'm not your fairy godmother. I am a financial planner.' "

1188 Bishop Street Suite 1207
Honolulu, HI 96813
PH- 808.524.6823
r.leedriscoll@gmail.com