

2012



San Diego  
Human Dignity  
Foundation

# Professional Advisor Network *Resources and Referrals*

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[www.my-lgbt-foundation.org](http://www.my-lgbt-foundation.org)

*The San Diego Human Dignity Foundation was established in 1996 with a mission to improve the quality of life within San Diego's lesbian, gay, bisexual and transgender (LGBT) community by promoting responsible philanthropy to enact positive social change.*

*We are committed to partnering with professional advisors - attorneys, financial advisors, accountants, and others - to serve the LGBT community as fully and responsibly as possible, given the complex, discriminatory, and fast-changing legal environment that LGBT clients face.*



San Diego Human Dignity  
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PO Box 33245  
San Diego, CA 92163  
619-291-3383

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- **Bair, Marci, CFP** - Bair Financial Group— An Office of MetLife: **Financial Planning Services** - [www.bairfinancial.com](http://www.bairfinancial.com) — 619-497-2279
- **Barger, Danielle, Esq.** — Barger Law Group, APC: **Estate Planning, Real Estate and Business Law** — [www.bargerlawgroup.com](http://www.bargerlawgroup.com) — 858-755-7578
- **Benedict, Tara**—**Financial Advisor** Merrill Lynch Global Wealth Management—[tara.benedict@ml.com](mailto:tara.benedict@ml.com) -619-699-3709
- **Bestard, Antonio, Financial Advisor**—Merrill Lynch Global Wealth Management <http://fa.ml.com/antonio.bestard> —[antonio.bestard@ml.com](mailto:antonio.bestard@ml.com)—619-699-3798
- **Bevan, Matthew** — Allstate Insurance — **Commercial Sales Producer** — [matthew.bevan@allstate.com](mailto:matthew.bevan@allstate.com) — 619-278-0081
- **Brown, Eric, CMFC**—Waddell & Reed, Inc.— **Financial Planning and Insurance** [www.ericbrown.wrfa.com](http://www.ericbrown.wrfa.com) — [ericbrown@wradvisors.com](mailto:ericbrown@wradvisors.com) 619-297-2003
- **Conway, Larry, CPA, Esq.** — **Estate Planning & Tax Services** — The Law Offices of Larry Conway- <http://www.larryconway.com> — 619-235-9354
- **Cooke, Kenneth M., Esq.** — The Law Offices of Kenneth M. Cooke — **Estate Planning, Business Law, Real Estate & Bankruptcy Law** [www.lawofficesofkennethcooke.com](http://www.lawofficesofkennethcooke.com) —619-696-7196
- **DaSilva, Michael, Esq.** — Michael Allen DaSilva, P.C. — **Tax Attorney** [pitbull92107@yahoo.com](mailto:pitbull92107@yahoo.com)— 619-281-1239
- **Donaldson, Britton, Esq.** - Britton Chase Donaldson, **Attorney at Law** [brittondonaldson@yahoo.com](mailto:brittondonaldson@yahoo.com) — 619-865-9945
- **Duffy, Brogan, CPA** - Brogan Duffy, CPA — **Certified Public Accountant** [www.broganduffy.com](http://www.broganduffy.com)—619-295-1879
- **Dunigan, Jeff, Financial Advisor** — UBS Financial Services [jeffrey.dunigan@ubs.com](mailto:jeffrey.dunigan@ubs.com) — 858-454-9181
- **Gebhardt, David, Esq.** — Centara Legal Group, APC — **Senior-specific Law Services** <http://www.centaracapital.com> — 619-398-1700

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- **Jaeger, Brian** — **Financial Advisor**, New England Financial — [bjjaeger@swadvisors.com](mailto:bjjaeger@swadvisors.com)- 619-683-6237
- **Kaftal, Steven, Esq.**—Law Office of Steven E. Kaftal— **Criminal Defense & Litigation Attorney** — [www.kaftal.com](http://www.kaftal.com) [steve@kaftal.com](mailto:steve@kaftal.com) 619-453-7847
- **Lauth, James, Esq.**- Beamer, Lauth, Steinley & Bond, LLP — **Estate Planning and Probate** — [jlauth@lawbls.com](mailto:jlauth@lawbls.com) -619-235-6800
- **McPherson, Doug, CFP-** 1st VP, Wealth Management - Smith Barney — **Certified Financial Planner** — <https://www.smithbarney.com> [douglas.s.mcpherson@smithbarney.com](mailto:douglas.s.mcpherson@smithbarney.com) — 619-544-6503
- **Prost, Tony, Esq.**- Law Office of Anthony Prost— **Estate Planning** <http://www.thatgaylawyer.com> — [tonyprost@aol.com](mailto:tonyprost@aol.com) — 619-239-3392
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- **Regas, Rose, CPA** - Rose Pang Regas CPA, A Professional Corp. **Certified Public Accountant** — 619-298-1682
- **Sousa, Michael, Esq.**- Law Offices of Michael P. Sousa, APC — **Trusts, Wills and Probate** — [msousa@uclawyer.com](mailto:msousa@uclawyer.com) - 858-453-6122
- **Stockton, Mary** - Stockton Financial & Insurance Services — **Financial Planning and Insurance Broker** — [stocktonm@ft.newyorklife.com](mailto:stocktonm@ft.newyorklife.com) — 858-623-8945
- **Yeager, Eric, CFP, AAMS** - Ameriprise Financial Planning — **Financial Planning Services** — <http://www.ameripriseadvisors.com/eric.h.yeager> - 858-552-4531
- **Yeater, Bradford R., GEPC** - Comprehensive Wealth Management — **LPL Financial Estate Planning**—<http://comprehensivewm.com> - 800-801-8014

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