

Allied Professionals Council

The Allied Professionals Council for Legacy Health provides support, advice and counsel to the planned giving program for The Office of Philanthropy. The foundations served include Emanuel Medical Center Foundation, Good Samaritan Foundation, Legacy Health Foundation, Meridian Park Medical Foundation, Mount Hood Medical Center Foundation, Randall Children's Hospital Foundation, Salmon Creek Hospital Foundation and Silverton Health Foundation.

Members of the group are representative of the various geographical areas served by Legacy Health and include attorneys, financial planners, life insurance agents, stockbrokers, real estate brokers, trust officers, accountants and tax professionals. These community leaders provide expert advice in all aspects of planned giving. We rely on their expertise particularly in the areas of annuities, trusts, deferred gifts and gifts of real property or stock.

Legacy Allied Professionals are invited to meet two times annually to hear noteworthy speakers, discuss industry trends and advise Legacy Health on estate planning matters. Board of Trustees and Allied Professionals will be noted on our website and occasionally in print materials.

We look forward to partnering with our Allied Professionals in furthering Legacy Health's mission:

Our legacy is good health for

our people

our

patients

our

community

our world

For more information regarding the Allied Professionals Council at Legacy Health, contact Kathy Hostetler, Gift Planning, 503-276-9496 or khostetler@lhs.org.

Allied Professionals Council (as of 8/15/2018)

Kay B. Abramowitz

Partner (Ret.)
Miller Nash Graham & Dunn LLP

Roy Abramowitz

Shareholder (Ret.)
Perkins & Co

Sheryl Acheson

Bonhams

Robert K. Adams

Senior Vice President
OBS Financial Services

Karen Ault, E.A.

K.A. Accountancy

Samuel H. Barnett

Investment Advisor
Pacific Advisors

Joseph Benz

Sales Executive
Commercial Lines USI

Rebecca Bibleheimer, J.D., LL.M.

Vice President
US Bank Charitable Services Group

Victoria Blachly, J.D.

Law Partner
Samuels Yoelin Kantor LLP

Jan Bottcher

Senior Vice President
CBRE, Inc.

John M. Boylston

Attorney at Law
Myatt & Bell, P.C.

Christopher M. Brooks

Attorney at Law
Brooks Estate Law, P.C.

Richard L. Brown III, CTFA

VP, Regional Fiduciary Manager
Wells Fargo Private Bank

Julie C. Bryan, CFA

Portfolio Manager
Allen Trust Company

Michael Burgoyne, CFP, CHFC, AIF

President
Laurus Wealth Management

Chris Busby

Partner
CFG Wealth Management

Tammi M. Caress, J.D., LL.M.

Caress Law, P.C.

Kimberlee M. Christian

Financial Services Professional
New York Life

Tim D. Clairmont, CFP, MSFS

Founder/Managing Partner
Clear Financial Partners

D. Mike Collins, CFP

Financial Advisor
The BIRDIE Group, Morgan Stanley

Kristi Combs

Director
Greycourt

Joe Connors

Vice President, Relationship Banking Officer
Pacific Continental Bank

Clayton Cooper

Financial Advisor
Northwestern Mutual

Skip Currier, CFP, ChFC

Executive Vice President
TenBridge Partners LLC

Henry P. Davison Jr.

Principle Broker
Realty Trust Group

Shawn DuBurg

Director – Private Wealth Advisor
Private Wealth Management
Union Bank

David Durant, ChFC

Financial Services Rep./ Prncor Registered Rep.
Principal Financial Group dba Perimeter Risk Management

B. Edward Duvall, CRPS, CISP

Senior VP/Oregon Trust Manager
Columbia Trust Company

Jay Dyer

Regional Marketing & Client Service
Becker Capital

Lisa M. Faust

Senior Vice President
Columbia Bank

Theodore E. Fettig, CWS

Wealth Advisor
Key Private Bank

Jerome C. "Tonk" Fischer, CPA

Fischer, Hayes & Associates, P.C.

Katherine Fox

Certified Financial Planner
Arnerich Massena, Inc.

Sam Friedenberg

Attorney at Law
Law Offices of Nay & Friedenberg

Michelle Castano Garcia

Principal, Wealth Manager
Northwest Investment Counselors LLC

Glen Goland, JD, CFP®

Senior Wealth Strategist
Arnerich Massena

Gregg G. Goulet, CFP

Wealth Management Advisor
Northwestern Mutual

Steve Gradow

President
Gradow Capital Management LLC

Allied Professionals Council, Cont.

Gerald Graves

Boston Private Wealth

Barbara Green, CTFA

Co-Owner

Levy & Green Fiduciary Services

Heather L. Guthrie

Attorney at Law

Dunn Carney Allen

Higgins & Tongue, LLP

Siri Gypmantasiri

Financial Advisor

The Collins Robertson & Assocs.

Marta Halvorsen

Financial Advisor

Edward Jones

Kristin E. Hanneman

Financial Advisor/Portfolio Manager

Morgan Stanley, Columbia Shores

Gisel Hillner Walsh

National Banking VP

Bank of the West

Laura Holcombe, CFP

Financial Consultant

Resource Financial

Kathryn E. Holland, J.D.

Attorney at Law

Pabst, Holland & Reynolds PLLC

Steven V. Jackson, CIMA®

SVP-Wealth Mgmt, Financial Advisor

Morgan Stanley

Mark Kadomatsu, CFP, ChFC, CLU

Senior Financial Planner

Human Investing

Emily V. Karr, J.D., LL.M.

Partner

Stoel Rives, LLP

Kathleen Kee, CFP

Partner, Chief Executive Officer

Confluence Wealth Management LLC

Tara L. Kinateder

Senior Vice President, Private Client Advisor

Ferguson Wellman Capital Mgmt.

Michael D. Levelle

Attorney at Law

Sussman Shank LLP

F. Jackson Lewis II

Attorney at Law

Tonkon Torp LLP

Michael L. Lortz, CPA

Geffen Mesher & Company, P.C.

Eric Maher

Managing Director

Wealth Strategies Northwest

Laura Markee, CFA, ASA

Markee Valuations LLC

Dan Marsh

Attorney at Law

Marsh, Higgins, Beaty & Hatch, PC

Daniel Monaghan

TAG Managing Director

Brighton Jones

Morgan M. Montgomery

Financial Sales Manager

First Citizens Bank

Michael A. Moore

Crestline Capital, LLC

Ryland Moore

Principal, Dir. Of Bus. Development

Arnerich Massena, Inc.

Cheryl Mozinski

Vice President, Commercial Group

Fidelity National Title

Tim Nay, MSW

Attorney at Law

Law Offices of Nay & Friedenberg

Jason D. Norris, CFA

Executive Vice President

Ferguson Wellman Capital Mgmt.

James W. North

Assoc. VP, Wealth Management

Morgan Stanley Strand York Group

Laurel Numbers

Financial Advisor

The BIRDIE Group at Morgan Stanley

Michael O'Reilly

Principal

Vista Capital Partners

Jonathan M. Owens, CFP, AIF

Vice President

BPG Wealth Management

D. Jeff Paustian

Managing Director – Investments

JGP Wealth Management Group

Rick Pogue, CLU, ChFC

Owner

NW Investment & Insurance Consulting, LLC

Michael Radakovich, CFP, CLU, ChFC

Co-Founder and Financial Advisor

Summit Advisors NW, Securities offered through KMS Financial Services, Inc

Gregory M. Railsback, CPA, PFS, CFP, MBA

Shareholder

Railsback Johnson, PC

Robert W. Reynolds

Investment Management Specialist

Wells Fargo Private Client Svs.

Allison D. Rhodes

Partner

Holland & Knight LLP

Mary Ann Robinson, CFP

Vice President and Trust

Relationship Manager

US Bank

Dino M. Rocha, CFP

Edward Jones & Co

Allied Professionals Council, Cont.

Alina O. Rocha

Financial Advisor
Edward Jones & Co.

Bill Roller, CFA, CFP

President
BR Capital

Kim Rosenberg

*Financial Planning and Investment
Advisor*
Rosenbaum Financial, LLC

David Saltzman

Elk Rock Capital
Partners, LLC

Gregory L. Schmidt, CEBS

Financial Services Representative
Principal Financial Group

Larry Schwartz

Vice President, Branch Manager
Riverview Community Bank

Laura Sheldon

Real Estate Broker
Berkshire Hathaway Home
Services

Doug Sippel

Chief Transition Officer
Titan Financial Associates, Inc.

Ginger Skinner

Attorney at Law
Skinner Law

Steven H. Smith

Partner
Smith, McDonald & Vaught, LLP

Karen Soll

Product Manager
Finastra

Richard B. Soloman, CPA

Self-employed

Anne C. Steiner

Attorney at Law
Anne C. Steiner, PC

Tim Tank

Financial Advisor
Morgan Stanley

Christopher A. Thompson

Sales Manager
TEC Equipment

Cynthia Boman Thompson, MS, CFP

*Director of Financial and Accounting
Services*
Cinder Finance

Katherine O. VanZanten, LL.M.

Attorney at Law
Cable Huston LLC

Carol Warneke

*Vice President, Relationship Banking
Officer*
Pacific Continental Bank

Anthony R. Warner

Portfolio Management Associate
Key Private Bank

Ryan J. Wayman

Agency Executive Vice President
AXA Advisors, LLC

Richard Williams

Managing Partner
Strategic Financial Partners, Ltd.

Christopher Winn, CFP, MBA, CDFIA

Senior Wealth Manager
InterActive Wealth Advisors, Inc

June M. Wiyrick Flores

Partner
Miller Nash Graham & Dunn LLP

Henry P. Zewald

Wealth Management Consultant
US Bancorp