

REAL ESTATE AND FINANCIAL REFERRAL LIST

Tax Consulting and Planning:

- Maryann Ross with MLP Financing, Enrolled Agent (408) 392-7002 mross@mlpfinancial.com
- Janet Bocek – CPA (650) 691-9450 janet@bocekdpa.com

Financial Planning and Investing:

- Tim Pidgeon with Wachovia Securities (800) 634-4965 pidgeongroup1@wachoviasec.com (SF and Marin County)
- Dave Samuels or Devin Mackie with AIG Securities (408) 995-0915 devin@aigfinancialadvisor.com (South Bay)

Estate Planning and Elder Law:

- Chris Gemignani, Attorney at Law (408) 286-1085 cag@advancedestateplanning.com
- Lorie Robertson, Attorney at Law (831) 768-8246 llr@direcway.com

Residential General Contracting for Remodels and New Construction:

- Mike McCloud, General Contractor (408) 482-0527 mmcbuilding@sbcglobal.net
- Adrian Kutch, General Contractor (650) 917-9150 ajkcon40@aol.com
- Rich Mathers, General Contractor (650) 941-8218 rmcinc55@comcast.net

Property Management:

- Brett Thomas, Managing Broker (650) 903-2211 bt@btproperties.com (Typically for 10 Units or More)

Insurance Services:

- Mike Sims with Golden Crest Services (408) 995-0915 ceo@goldencrest.net (Life and Long Term Care)
- Dan Lorber with Allstate Insurance (650) 322-5191 SCAA7601@Allstate.com (Property and Casualty)

Legal Consulting (ie: TIC Agreements, Lease Agreements, Contracts, Residential or Commercial Legal Issues):

- Stephen Pahl, Attorney at Law (408) 286-5100 spahl@pahl-gosselin.com
- Lino Martire, Attorney at Law (408) 280-6898 lino.martire@martirelaw.com

Qualified Intermediary for 1031's and Reverse 1031's:

- Joel Baker with Equity Preservation (650) 248-1775 joel@equitypreservation.com
- Debra Culbertson with First American (800) 833-4343 dculbertson@firstam.com

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