

CATHOLIC COMMUNITY FOUNDATION OF SAN DIEGO

ESTATE AND LEGACY PLANNING RESOURCE LIST



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Meredith G. Alcock received a B.A. *cum laude* from Yale University in 1980 and a J.D. *magna cum laude* in 1986 from the University of San Diego. Ms. Alcock is a member of the State Bar of California, estate planning, trust, and probate section. She is certified as a specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization and has been continuously certified as a specialist for over 25 years. She is rated AV by Martindale-Hubbell. She is listed in the Best Lawyers in America referral guide. Her practice includes estate planning and settlement matters.

She is a past president of the Thomas More Society of San Diego. She rows in the master's program at ZLAC Rowing Club in Pacific Beach and is a past president of that club and the current president of the ZLAC Foundation.



Elizabeth G. Blust, Esq.
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Elizabeth G. Blust entered law school with the intent of becoming a real estate lawyer, but soon after passing the bar realized that her true calling was estate planning and estate administration. Planning and administration – whether through probate or trusts – can be confusing. Often there is not a clear path that is “right,” or there may be many paths that will get the clients where they need to go. Most of her clients own real property, so Elizabeth has opportunities to draw upon her 10+ year career in real estate development as she helps her clients navigate through the often baffling tangle of laws and forms.

She is a member of the California Lawyer's Association, the San Diego County Bar Association, the San Diego Business Equality Association, Probate Attorneys of San Diego, and the San Diego Press Club. She sings at a local retirement village as part of her church's outreach ministry and sings with the San Diego Festival Chorus.

While in college, Elizabeth worked in the International Studies office and spent a summer abroad herself, discovering a love of travel that she now shares with her husband Jim and their two children.



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Carolyn R. Brock is a sole practitioner with an office in Scripps Ranch and a satellite office in La Mesa, California. Carolyn was certified by the State Bar of California Board of Legal Specialization as a Specialist in Estate Planning, Trust and Probate Law (2004). Carolyn has been practicing law for over 25 years, working predominantly in the areas of Estate Planning, Trusts, Wills, Probate, Conservatorships, Trust Administration and Corporate/Business Law and Qualified Domestic Relations Orders.

Carolyn graduated from Thomas Jefferson School of Law in San Diego, California in December of 1994. Carolyn was on the National Deans List from 1991 - 1993, and a member of the San Diego Justice Journal law review writing staff from 1992 – 1993 during which time she authored, "Nonfiduciary Liability Under ERISA", San Diego Justice Journal Vol. 1, No. 1, Summer 1993.

Carolyn is admitted to practice law before the courts of the state of California, the U.S. District Court Southern District, and the Ninth Circuit Court of Appeals. Carolyn is a member of the Foothills Bar Association and the San Diego County Bar Association and the Estate Planning Section of the Bar. Carolyn currently teaches a paralegal course on estate planning and administration through the UCSD Extension, typically in the spring semester. Carolyn is also a member of the St. Thomas Moore Society of San Diego.



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Nate Conley is an associate attorney at Sheinberg Law Group. His practice focuses on wills, trusts, and probate. Nate works hard to ensure that each client's estate plan is customized to their own needs and wishes, and drafted specifically to avoid the many problems that often arise in trust and probate administrations.

Nate is a member of the State Bar of California and an active member of the San Diego legal community. He works with a large network of attorneys and other trusted professionals, so that if his clients need outside services, he can get them to the right person quickly and efficiently.

Nate grew up in Kailua, Hawaii and attended college at Bradley University in Peoria, Illinois. After graduation, he spent 3 years in the U.S. Army as a medic, including one deployment to Iraq, before attending law school at DePaul University in Chicago, Illinois. He then moved to California and settled in San Diego. In his spare time Nate enjoys movies, reading, writing, running, and playing pool. He spends most of his time hanging out with his wife, Annie, and their 2 children, Luke and Noah.



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Andrea Gherini has been a lawyer for over thirty-five years. She graduated cum laude from the University of Southern California with a Bachelor of Arts degree and from Loyola Law School, Los Angeles with Dean List Honors. The mission of Ms. Gherini's practice is to listen, with compassion, to the needs expressed by her clients and to apply her professional expertise to craft solutions to her clients' problems in the areas of Estate Planning, Elder Law, Probate, Trust Administration, Medi-Cal Planning, and Special Needs Law.

Ms. Gherini has been rated AV "Preeminent" by Martindale Hubble, based on peer reviews. She is a member of the Trusts and Estate Section of the California Bar Association and the Bar Association of North San Diego County. Ms. Gherini served as Co-Chair of the Trusts & Estate Section for the North San Diego County Bar Association from 2007-2009. She currently serves on the panel of San Diego Superior Court appointed attorneys in conservatorship matters. Ms. Gherini is also a member of the National Academy of Elder Law Attorneys and is the past President of its Southern California Chapter. In 2008, she received the Wiley W. Manuel Award from the California State Bar Association for pro bono legal services and in 2016 the National Academy of Elder Law Attorney's recognized her as Chapter Member of the Year for Southern California. Ms. Gherini is on the Presentation and Referral Panel for the Southern California Caregiver's Resource Center and the Alzheimer's Association San Diego.

Ms. Gherini and her husband, Brad Gallant, have lived in Oceanside for over 35 years and have 2 adult children and two Bernese Mountain dogs.



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Mark Ignacio attended the University of San Diego (USD), and graduated Magna Cum Laude in just three years with a bachelor's degree in psychology, and with minors in English and philosophy. During his time at USD, Mr. Ignacio served as the Undergraduate Writing Center Coordinator and tutor, in addition to leading various University Ministry activities. By the time he graduated, Mr. Ignacio earned several distinctions including: Honors Program Graduate, Phi Beta Kappa, Mortar Board (National College Senior Honors Society), Psi Chi (Psychology Honors Society), and Sigma Tau Delta (English Honors Society). Mr. Ignacio then enrolled at Hamline University School of Law in Saint Paul, Minnesota, after receiving an academic scholarship.

However, because of a family illness, Mr. Ignacio returned to San Diego and enrolled at California Western School of Law (CWSL). While at CWSL, Mr. Ignacio served as a legal intern for the Legal Aid Society where for his service, the State Bar of California awarded Mr. Ignacio with the Wiley B. Manuel Award for Pro Bono Services. Mr. Ignacio graduated from CWSL in the top 25 percent of his class, along with earning an academic excellence award.

Mr. Ignacio is a big sports fan, especially baseball, and attends Padres games at Petco Park when he can. He also enjoys traveling, swimming, cooking and photography during his spare time.



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Carl Larson is a partner in Burkhardt & Larson. He is chiefly responsible for the firm's business and estate planning practice. Mr. Larson is experienced in all types of entity formations and consults with business owners regarding a wide variety of matters that arise out of manufacturing, distribution, licensing, and other business operations. His estate planning experience includes over 300 fully integrated estate plans.

Carl attended the University of San Diego School of Law for his Masters of Law Taxation in 1992 and received his Juris Doctorate from University of California at Davis in 1987. He also attended the Institute of Japanese Studies for a Two-Year Certificate in Japanese Language after receiving his BA from University of California at Los Angeles.



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Rosemary Leonard (Rosemary Meagher-Leonard) has been a licensed California attorney since 1980 and has had her own practice since 1981. Since the mid-1990's Rosemary has practiced exclusively in the area of Estate Planning, Probate, and Elder Law. My goal is to provide personal, individualized legal services to each one of my clients. Her goal is to ensure that every client is treated as an individual and with the utmost respect.

Rosemary has considerable experience as an estate planner including. Among other documents, Rosemary has assisted clients with creating and amending inter vivos (living) trusts, bypass, special needs trust, dynasty trusts, irrevocable trusts, insurance trusts, legacy trusts, and charitable trusts, advanced health directives, wills, and powers of attorney. Rosemary also advised clients with family limited partnerships, limited liability companies, and Medi-Cal/Medicaid and Medicare planning

Rosemary graduated from Thomas Jefferson School of Law (formerly Western State University) in 1979 and from San Diego State University in 1976. She is married to her husband Scott, has three adult children and two grandchildren. Rosemary enjoys traveling, walking, fitness classes, reading, and spending time with her husband, children, and grandchildren.



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Suzanne P. Nicholl graduated cum laude from Monmouth University in West Long Branch, New Jersey. She obtained her juris doctor from Thomas Jefferson School of Law in San Diego, California. Among her academic achievements, she received the American JurisPrudence Award, California Jurisprudence Award, and Witkin Award in Accounting for Lawyers. While in law school, she was a member of both the Mock Trial Team and the Alternative Dispute Resolution Team. Additionally, she worked in the domestic violence clinic of the San Diego Volunteer Lawyer Program and was recognized for her work with the Pro Bono Award. Suzanne had the privilege of studying comparative constitutional law with United States Supreme Court Justice Ruth Bader Ginsburg in Nice, France. Additionally, she served as the Community Service Chair of the Christian Legal Society at Thomas Jefferson.

Suzanne's career experience includes estate planning, probate, trust administration, trust and estate disputes/litigation, guardianships, conservator ships, corporate and business entity formation and compliance, stock acquisitions, commercial, residential, and cellular lease agreements, IRS and FTB tax compromise offers, IRS audit defense, ERISA pension compliance, and general civil litigation. Suzanne is a Certified Legal Specialist in Trust & Estate Planning.

She proudly serves as a member of the Board of Directors of Elder Law & Advocacy, a local non-profit that helps seniors defend their legal rights and preserve their respected place in the community.



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Pablo Palomino was born in Puerto Vallarta and raised in San Diego. He graduated with double majors in Economics and Rhetoric from the University of California at Berkeley in 1998. Mr. Palomino received his Juris Doctor degree from the University of Southern California and passed the California Bar Exam in 2002 and admitted to practice before all state courts in California and the U.S. District Courts for the Districts of Southern and Central California.

Mr. Palomino is fluent in both English and Spanish and enjoys helping those people with all their estate planning, probate, and trust administration needs. His greatest reward is developing trusted life-long relationships in the process.

Helping others through volunteering is important to Mr. Palomino. In addition to serving as advisor to various business and professional groups, he serves on many local boards for non-profits and foundations. He mentors aspiring attorneys and business owners and is a proud father of twin girls.



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Daniel J. Perwich is an experienced and accomplished attorney practicing law in California for nearly forty years. His focus for the last twelve years has been in estate planning and trust administration. Mr. Perwich studied business and psychology and received a bachelors of Business Administration from the George Washington University in 1980. Mr Perwich studied the law at the University of San Diego and graduated with a JD in 1983. Mr. Perwich is experienced in real property transactions and has held a California brokers license for the last twenty years. Mr. Perwich is a practicing Catholic, and is active in his parish, Sacred Heart Catholic church in Coronado and is a former lay director of the San Diego Cursillo movement. Mr. Perwich works primarily from his office in Coronado, but also maintains an office in San Diego. Mr. Perwich is happy to make house calls for clients who need or prefer a home visit.



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Ruth Ryan-Cruz is a local bilingual (English, Spanish) attorney at Ryan-Cruz Law, APC. She practices in the areas of business law, real estate law, and trust & estates (Wills, Trusts, Probate, and Trust Administration). Raised in North County San Diego, Ruth has made her mark in San Diego County. She established her first business at the age of 16 in website development. As an attorney, she was named a "Rising Star" by the San Diego Attorney Journal for excelling in the practice of law.

In the area of estate planning she has helped hundreds of families establish their wills, trusts, and estate planning documents by helping each family protect their assets and build wealth along the way. She has also helped families work through Probate and trust administration challenges involving disputes concerning specific assets, bank accounts, real property issues, business interests, and disputes involving complicated family dynamics.

During her downtime, Ruth greatly enjoys traveling domestically and internationally, biking, hiking, kayaking and tent camping with friends and family. Ruth also enjoys movies, web designing, cooking Mexican food and the San Diego Zoo and Safari Park. Ruth, her husband Matt and their daughter greatly enjoy living in Southern California.



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Since 2005, Michael Sousa has been helping clients in the La Jolla and University City areas with their estate planning needs. Mr. Sousa assists clients with living trusts, trust administration, wills, powers of attorney, and probate administration. In addition to estate planning, Mr. Sousa has extensive experience in employment and class action litigation, including several multi-million-dollar cases involving thousands of nationwide class members.

Mr. Sousa graduated from San Diego State University *cum distinctione* with a degree in Philosophy and Classics. He then attended the School of Law at the University of San Diego and graduated in 2003, being admitted to the California Bar in the same year. After working for a local plaintiff employment law firm, Mr. Sousa established the Law Offices of Michael P. Sousa in 2005. He has been in the same location (by Our Mother of Confidence Church) since starting his practice and prides himself on helping local members of the community. He and his wife Karla (and their dog Foxy) live nearby in La Jolla Colony.



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Attorney Vance has practiced law for 13 years in San Diego. After graduating from California Western School of Law with a concentration in Child, Family and Elder Law, she became a member of the California Bar in 2007. Her areas of practice have included estate planning, probate guardianships, immigration, family, and elder abuse law. As an attorney in the Juvenile Dependency Court she successfully represented parents to achieve family reunification. Amy established landlord tenant law clinics for the California Administration of Courts and has recruited and trained volunteer attorneys to staff public interest law clinics.

Amy works diligently to maintain a professional reputation as a friendly, dedicated, and trusted advocate and counselor at law and provides personalized attention to her clients. Amy serves on the Board of the Thomas More Society of San Diego, and as Vice President of the Board of Children of the Immaculate Heart, she is helped to establish a residential treatment home for minors who have survived human trafficking. Amy is also a member of the California Bar Association, Trust & Estates section.



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Trevor White was educated at Gonzaga University and California Western School of Law. In 2010, Trevor proudly began his career as an officer in the United States Marine Corps. Once admitted to legal practice in 2012, he served as a Marine Corps Judge Advocate at bases in California, Virginia, and finally at his home in Yuma, Arizona. At the close of his active duty tour in Yuma, Trevor and his family made the decision to stay in the community they so love, and Trevor joined the Shadle & White law firm in May of 2016. While Trevor continues to serve as a Major in the USMC Reserves, he takes pride in running the Shadle & White law firm which serves clients throughout Arizona and California. Trevor's focus is on estate planning, wills, trusts, probate and probate litigation, business planning and incorporation, and agricultural law.

Trevor grew up all over Southern California, and still loves to visit as one of his favorite hobbies is surfing. His ties to the Yuma community are also long standing – his father grew up in Yuma, his beautiful wife was raised in Yuma, and three of his four children were born in Yuma. Trevor takes great pride in calling Yuma home, and is an active parish member at St. John Neumann Catholic Parish. His ties to and deep understanding of the communities he serves have cultivated a targeted understanding of these unique communities' driving industries as well as the needs of its seasonal and year-round residents.



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Mr. Zarcaro is the principal of the law firm of Zarcaro & Associates, A.P.C., with offices in Carlsbad, Rancho Bernardo and Mission Valley. The firm's practice is limited to Elder Law, Estate Planning and Trust administration. The firm's goal is to provide the highest quality legal work in a warm, personalized setting.

John received his law degree from the University of San Diego where he received the American Jurisprudence Award and the Prentice-Hall Tax Award. Mr. Zarcaro began practicing law in 1992 and focuses his practice on the areas of Elder Law, Estate Planning and Trust Administration.

Mr. Zarcaro is a member of ElderCounsel and WealthCounsel; organizations which provides the best legal education, tools and systems to their members.

Mr. Zarcaro is devoted to assisting his clients in preserving wealth for themselves and for future generations. Many of John's clients have referred their friends and families, because they are satisfied with the professional service he provides.