Rady Children's

WOMEN & FINANCE WORKSHOP SERIES

THURSDAY, AUG. 31 | 10:30 A.M.

What is a Trust and Do I Need One?

Location: Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C.
3580 Carmel Mountain Road, Suite 300, San Diego, CA 92130

Jennifer McGibbons

Partner – Sullivan, McGibbons, Crickard & Associates, LLP

Jennifer is a founding partner of Sullivan, McGibbons, Crickard & Associates LLP. She provides the Firm's clients advice in the areas of estate planning, estate and trust administration, probate, and charitable planning.

Jennifer is a Certified Specialist in Estate Planning, Trust, and Probate Law by the California State Bar. She has given numerous presentations on estate and trust topics for various organizations, including the American Bar Association, California Lawyers Association, North County Estate Planning Council of San Diego, San Diego Estate Planning Council, San Francisco Estate Planning Council, and CEB. Prior to forming Sullivan, McGibbons, Crickard & Associates, Jennifer practiced at Henderson, Caverly, Pum & Charney LLP, and at Luce, Forward, Hamilton & Scripps LLP, in San Diego.

Jennifer is actively involved in the San Diego Community. She is a member of the California State Bar Association (Trusts & Estates Section), the San Diego County Bar Association, and the North County Estate Planning Council. Jennifer is also a member of the Rady Children's Hospital Foundation Executive Committee and the Scripps Memorial Hospital Encinitas Advisory Council, of which she has been the Chair since 2021.

Rady Children's

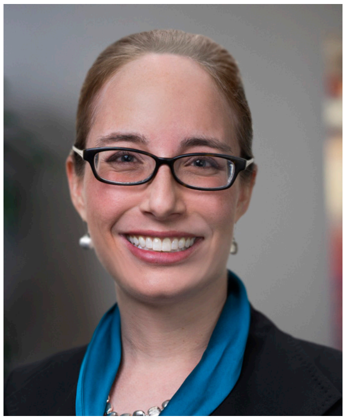
WOMEN & FINANCE WORKSHOP SERIES

THURSDAY, SEPT. 14 | 10:30 A.M.
Unveiling Financial Regrets: Reflections and Lessons Learned

Location: Corient Private Wealth, LLC
12265 El Camino Real, Suite 300, San Diego

Anna Diaz
Partner – Corient Private Wealth, LLC, formerly knowns as Dowling & Yahnke

Anna is a Partner and Wealth Advisor at Corient (formerly known as Dowling & Yahnke Private Wealth) Passionate about helping her clients both understand and navigate the financial questions they face throughout their lives; she especially loves partnering with people to accomplish true success on their terms. Anna has over 20 years of experience in the wealth advisory field and holds elevated designations such as the CERTIFIED FINANCIAL PLANNER (CFP), Certified Private Wealth Advisor (CPWA), and Certified Exit Planning Advisor (CEPA) designations. She also holds an executive certificate in Investment Strategies and Portfolio Management from Wharton and is currently staying for the Accredited Estate Planner designation (AEP). She enjoys simplifying the complex financial world, so her clients maximize their outcomes, feel empowered in their financial decisions, and feel they have a partner who has a close eye on their financial wellness. Anna is passionate about giving back and serves on the Board of Stella Foundation; an organization that helps female founders. She is most proud of her role as a mom to her two children and has been married to her husband for 15 years. Anna loves being outdoors in her city, family time, reading, music (of all types!) and salsa dancing when she gets the chance.



Hope Carlson
Partner – Corient Private Wealth, LLC, formerly knowns as Dowling & Yahnke

Hope Carlson, CFP®, CAP® is a Partner and Wealth Advisor at Corient (formerly known as Dowling & Yahnke Private Wealth). Passionate about helping her clients both understand and navigate the financial questions they face throughout their lives; she also especially loves partnering with people to accomplish their charitable goals. Hope spent six years as the Chief Development Officer at the Museum of Us, overseeing fundraising and marketing. She also served as the Interim Executive Director for the San Diego Civic Youth Ballet in Balboa Park and spent four years as a strategy consultant with the Boston Consulting Group. Hope holds a Master of Business Administration (MBA) from Harvard Business School where she was a Baker Scholar, graduating in the top 5% of her class. She also obtained her Master of Music in Vocal Performance and Literature from the Eastman School of Music and holds a Bachelor of Arts in Economics with Highest Distinction from the University of Virginia. A trained opera singer who has worked in both the for-profit and nonprofit space, Hope is most proud of her role as mom to her two daughters, Elizabeth, and Evelyn.

Rady Children's

WOMEN & FINANCE WORKSHOP SERIES

WEDNESDAY, SEPT. 20 | 10:30 A.M.

Trustee Selection: Choose Wisely to Safeguard Your Assets

Location: Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C.
3580 Carmel Mountain Road, Suite 300, San Diego, CA 92130

Charity Falls

CFP

Charity Falls was most recently Managing Director and Head of Wealth Planning at Union Bank. She helps high net worth clients and businesses design strategies to build, sustain and transfer wealth based on their distinct priorities. She has significant experience working with business owners and investors to structure business succession strategies and to plan for liquidity needs and consults clients on issues related to philanthropy, family legacy and taxation.