

ORANGE CATHOLIC FOUNDATION  
WILLS & TRUSTS WEEK PRESENTERS

**ATTORNEYS**



*Paige M. Baker, Esq.  
Baker & Baker, APC  
1970 Old Tustin Ave., Second Floor  
Santa Ana, CA 92705  
Phone: (714) 558-4832  
Fax: (714) 558-7547  
Email: pbaker@lawbaker.com*

Ms. Baker has focused her efforts on Estate Planning for more than twenty years. She brings to her practice a long history of listening carefully and explaining estate planning concepts to her clients. Her theory is that a client can have the best Trust in the world but if that client doesn't know how to make it part of their daily life then it doesn't work!

Ms. Baker graduated from USC with both a Bachelor of Science degree and a Masters Degree. Her legal background includes Western State University College of Law where she graduated with Honors and was Managing Editor of the Law Review. She was admitted to State Bar of California 1992 and the U.S. Supreme Court in 1996. She frequently lectures on Estate Planning and Charitable giving and is a Presenter for the Continuing Education of the Bar series on Estate Planning and Blended Families. She sits on the Board of the St. Joseph Hospital Foundation, is Past President of the Gray Inn of Court and USC Legion Lex; Ms. Baker is the author of *Depublication, The New Starchamber* 1990. In addition to estate planning, the firm of Baker & Baker focuses on litigation related to Real Estate, Probate and Business Transactions.



*William S. Brodak, Attorney at Law  
18101 Von Karman Avenue, Suite 230  
Irvine, CA 92612  
Telephone: 949-476-0400  
Facsimile: 949-476-0404  
Email: wbrodak@brodaklaw.com*

William Brodak is an accomplished attorney specializing in Estate Planning, Medi-Cal Planning, Probate, Trust Administration, and Elder Law who is dedicated to preserving one's assets by avoiding or reducing probate fees, estate taxes, long-term care costs, and Medi-Cal recovery claims. Mr. Brodak is known for his personalized service and works closely with clients to ensure each is protected through proper planning and estate administration. Mr. Brodak received his B.S. in Accounting from the Indiana Univ. of Pennsylvania and his J.D. from Pepperdine University School of Law. He is a member of the National Academy of Elder Law Attorneys, the California Advocates for Nursing Home Reform, the Orange County Bar Association's Trusts & Estates and Elder Law Sections, the Advisory Board for UCI's Institute for Memory Impairment and Neurological Disorders, and the Presentation and Referral Panel of the Orange County Caregiver Resource Center. Mr. Brodak practices in Irvine and has clients throughout Southern California.

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*Gregory J. Burnight  
Curtis & Burnight, APC  
13001 Seal Beach Blvd., Suite 375,  
Seal Beach, CA 90740  
Telephone: 562 435-7471  
Fax: 562 435-7405  
Email: greg@curtisburnight.com*

Mr. Burnight was born and raised in Long Beach and has been practicing law in Long Beach since 1991. His practice areas include Trust and Estate work in planning, administration, probate and litigation. He also specializes in real estate and business transactional matters. He is a member of the Estate Planning and Trust Council of Long Beach, as well as a member of the California Bar Association estate planning and real estate sections. His Trust and Estate practice includes planning work for individuals and families, as well as representation of corporate and professional fiduciaries.

Mr. Burnight earned his BA from the University of California at Berkeley, and his Juris Doctor degree from the University of Southern California. He is active in the Long Beach community, having served on the Long Beach Day Nursery Board of Directors, the Long Beach Chamber of Commerce Board of Directors, the Long Beach City College Adaptive PE Board of Directors, and had the privilege of serving as the 99th President of the Rotary Club of Long Beach. He is also a past president of the Long Beach Barristers. He has previously been honored to be named as a Rising Star by the Los Angeles Super Lawyers.



*Photo not available at time of print*

*Jeffrey D. Cavin, Attorney at Law  
251 East Imperial Highway, Suite 471  
Fullerton, CA 92835  
Telephone: 562-863-5600  
Facsimile: 657-378-9698  
Email: CavinLaw@la.twcbc.com*

Mr. Cavin has been practicing law since 1993. He specializes in Estate Planning, Probate, Trust Administration, Business and Real Estate Law. With over twenty-five years of experience he has prepared hundreds of estate plans for his clients by taking the time to explain to them their options and helping them find the solutions which fit them best.

Mr. Cavin is a native of Southern California. He received his undergraduate Bachelor of Arts degree in Political Science from the University of Southern California and his Juris Doctor degree from the University of La Verne College of Law, where he graduated Cum Laude and was a contributor and an editor of the college's law review, the Journal of Juvenile Law.

Mr. Cavin is a recipient of the Wiley W. Manuel Award for Pro Bono Legal Services, presented by the State Bar of California; and the Maynard Toll Pro Bono Award, presented by the Legal Aid Foundation of Los Angeles. He is an active and involved member of his parish, Saint Joseph in Placentia. He is married and has three wonderful children.

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*Robert Lamm, P.C.  
Cummins & White, LLP  
2424 S.E. Bristol, Suite 300  
Newport Beach, CA 92660  
Tel: (949) 852-1800  
Fax: (949) 852-8510  
Email: rlamm@cwlawyers.com  
Oficina HABLA ESPAÑOL*

Mr. Lamm joined Cummins & White, LLP as an associate in 2005 and became a partner in 2008. Mr. Lamm has extensive experience planning and drafting foundational estate planning documents consisting of revocable living trusts, wills, living wills, and powers of attorney for health care and asset management. In addition, he successfully helps multigenerational families transfer their business interests to succeeding generations through the use of more advanced estate planning techniques such as Intentionally Defective Grantor Trusts, Grantor Retained Annuity Trusts, Irrevocable Life Insurance Trusts, and Dynasty Trusts. His area of practice includes Estate Planning, Trust Administration, Taxation, Asset Protection and Probate. In 1996,

Mr. Lamm graduated magna cum laude from the University of Arizona he received BS (Criminal Justice), University of Arizona; JD, from California Western School of Law; and LLM (Taxation), University of Miami School of Law.



*Karla Lopez-Serafin  
Law Office of Karla Lopez-Serafin  
214 E Walnut St,  
Santa Ana, CA 92701  
(714) 884-4370  
lopezserafinlaw@gmail.com  
www.lopezserafinlaw.com  
HABLA ESPAÑOL*

Mrs. Karla Lopez-Serafin's practice is dedicated to estate planning, guardianships and family immigration matters. Her Estate Plans include Living Trusts, Wills, Powers of Attorney, Advance Health Care Directives and HIPAA waivers for couples as well as individuals.

Prior to opening her own private practice, Mrs. Lopez-Serafin lived in Italy and worked for an Italian engineering firm as head of overseas business development, negotiating contracts for development projects funded by various branches of the UN.

Mrs. Lopez-Serafin received her B.A. in International Studies from the University of California, Irvine and her J.D. from Loyola Law School, Los Angeles, where she served as a mentor and coordinator for the Judge Stephen O'Neil Trial Advocacy Mentoring Program. While in law school, she completed a Comparative French and European Union Law Course at the Nanterre University in Paris, France. She is fluent and able to conduct business in English, Spanish and Italian.

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*Jill Schachter*  
*Partner*  
*Heritage Law, LLP*  
*120 Vantis, Suite 300*  
*Aliso Viejo, CA 92656*  
*Phone: (949) 382-6400*  
*Fax: (949) 861-6940*  
*Email: [jschachter@heritagelawllp.com](mailto:jschachter@heritagelawllp.com)*

Ms. Schachter graduated Cum Laude from Southern Methodist University in 1992 with degrees in Economics and Finance. She spent the next 20 years working in the finance and real estate industries, while also raising four children. In 2010, Ms. Schachter graduated Magna Cum Laude from Whittier College of Law. Ms. Schachter provides clients with the support necessary to grow with them, their changing needs, and balance personal goals with tax management. These strategies include: full-service estate plan preparation, special needs trusts (SNT), separate property trusts, children's trusts, life insurance trusts (ILIT), spousal lifetime access trusts (SLAT), grantor retained annuity trusts (GRAT), qualified personal residence trusts (QPRT), family limited partnerships (FLP), trust administration, conservatorship services, elder law advice, probate court representation, and preparation of trust and probate accountings.

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*Adi Delfin*  
*Dignity Memorial – Orange County*  
*14801 Beach Blvd*  
*Westminster, CA*  
*Phone: (714) 893-2421*  
*Email: [Adikent.Delfin@sci-us.com](mailto:Adikent.Delfin@sci-us.com)*

Mr. Delfin is the Sales Director for Dignity Memorial and is responsible for his company's locations in Orange and north San Diego Counties, including Fairhaven Memorial Park in Santa Ana, Pacific View Memorial Park in Corona del Mar and Westminster Memorial Park. He has over 200 Family Service Counselors and Pre-Planning Advisors ready to assist families dealing with loss as well as pre-need planning. Mr. Delfin and his team are passionate about serving others during this difficult experience, and they do so by helping to uniquely celebrate every life with the individuality they deserve.

Mr. Delfin earned his BA from the University of California at Santa Barbara and currently lives in Huntington Beach with his wife and their two sons. The Delfins are parishoners of Our Lady Queen of Angels in Newport Beach where Mr. Delfin has served on the Parish Council as well as the teen Confirmation program. Their sons proudly attend OLQA School and Mater Dei are involved in the choir at Christ Cathedral. Mr. Delfin looks forward to serving all members of our Diocese.