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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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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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I was born and raised in Los Angeles County. I attended Chapman School of Law where I was an Articles Editor of the Chapman Law Review. After I graduated Chapman School of Law in 2008, I again attended Chapman School of Law to complete a master's program of LL.M. in Taxation. I graduated from the master's program of LL.M. in Taxation in 2009. Shortly after I graduated from Chapman School of Law, I was hired by Shatford Law.

In 2010 I became a partner of Shatford Law and we now have two offices located in Irvine and Pasadena. In 2017 I passed the Workers' Compensation Law Legal Specialization Exam and in 2019 I passed the Estate Planning, Trust and Probate Law Legal Specialization Exam. My firm practices in the following areas of law: (1) Workers' Compensation; (2) Taxation; (3) Civil; and (4) Estate Planning, Trust and Probate Law.



*William S. Brodak, Attorney at Law*  
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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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Mr. Matthew Hansen is a Senior Counsel at Clark / Trevithick in the Trust and Estate Department, Matthew focuses his efforts on estate planning, planned giving and tax-exempt organizations. Matthew represents individual, family, and small business clients in matters related to family wealth transfers, succession planning, charitable planned giving, and complex probate and trust administrations. Matthew also regularly represents tax-exempt organizations in formational, organization and operational issues. Matthew also has a strong background in trust litigation, probate, conservatorships and civil disputes.

Mr. Hansen is committed to helping his clients understand that the foundation of estate planning is appreciating the value of protecting themselves and their loved ones. He received his B.S., from Georgetown University in 2000 and his J.D., from George Washington University Law School in 2003.

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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.

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Ariana M. Perfecto is an attorney at Lagerlof, LLP in Pasadena, California. She focuses on estate planning and trust administration. Ariana earned her Juris Doctor from Pepperdine University School of Law. This year, the California Trusts and Estates Quarterly published her article entitled, “The Practitioner’s Guide to Preserving the Latino Legacy,” on how to effectively plan for recent Latino immigrants. Ariana also presented for the Patients Rights Action Fund on ethical issues concerning the California End of Life Option Act.

Lagerlof, LLP, is the largest firm in the San Gabriel Valley and has 112 years of experience satisfying clients. We are a team of trusted legal advisors on a mission to provide every client with clarity and understanding to succeed in a complex world. Lagerlof is grounded in tradition and focused on the future.

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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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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.



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My name is Cynthia V. Acosta and I'm a financial professional committed to helping individuals and families achieve their financial goals. My commitment towards helping those achieve their financial strategies began in 2010 after having lost my mother due to kidney cancer. As a young mother of two boys at the time, I found myself questioning whether I had prepared my own family for such an unexpected life event. Having worked for the University of Southern California in Preventative Medicine after graduating from California Polytechnic University with a degree in Biology, it really seemed a farfetched transition into financial services. However, my journey of being able to help others continued as I understood how important it was to safeguard our financial well-being and independence. My dedication towards educating and providing options in an effort to create proactive plans for the betterment of not only my clients but their continued family legacy resonated thanks to my previous experience.

I am proud to work with a firm that aligns itself with the same integrity and values for which I have upheld so dearly throughout my career as an advisor. With offices throughout the West, Pacific Advisors has served over 40,000 clients with personal, family, and enterprise financial strategies. I am currently housed in the City of Claremont but also have a second location in Irvine to help serve our Orange County community. As part of my volunteer work, I have had the pleasure of partnering with the Los Angeles Archdiocese Planned Giving Office for over a year and am just as excited to now be a part of volunteering for the Orange Catholic Foundation.

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Jorge Meza, Wealth Management brings over 25 years of experience in Financial Services. He specializes in all aspects of retirement & wealth accumulation. Jorge has extensive experience in Capital Management, 401(k)s, IRAs, 403Bs, TSPs, deferred compensation, and other retirement plans. For select clients he personally manages stocks and bonds portfolios.

Jorge is a Series 6, 26, 63, and 65 Registered Investment Advisor Representative with HBW Advisory Services LLC and a Registered Representative with Cetera Advisor Networks LLC. His other accreditations include certification as a Chartered Federal Employee Benefits (ChFEBC) Consultant and Dave Ramsey SmartVestor, along with being a

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PAYCHEX Advisor. He was awarded 2019 Five Star Wealth Manager. Jorge is licensed Life & Long-Term Care Insurance and produces in the states of California and Michigan. He is further registered in Arizona, Colorado, Florida, Hawaii, Idaho, Indiana, Missouri, Montana, Nevada, Oregon, Texas, and Washington DC.

Jorge believes it is important to enjoy and balance the fruits of life; for him it is family and travel. He was raised in Los Angeles County, Ca. He currently lives in Valencia with his wife, Theresa, and three wonderful children—Justine, Jorge and Jessica. Theresa and Justine also hold Life Insurance licenses. Throughout his flourishing career, Jorge has been helping people plan for a better future.

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