

# Associate Members - Guardian/Conservator Association of Oregon - September 25, 2021

Name	Address	Phone	Email	Certs
Cutter, Daniel	Merrill Lynch Special Needs Team 555 California Street, 9th floor San Francisco, CA 94703	415-676-2535	daniel_cutter@ml.com	
Elliott, James	Elliott, James 1020 SW Silver Lake Blvd. Bend, OR 97702	541-639-7484	jelliott024@gmail.com	
Fischer, Holly	Multnomah County Public Guardianship and Conservatorship Office 209 SW 4th Ave., Suite 510 Portland, OR 97204	503-988-8249	holly.fischer@multco.us	
	Additional info:			
Harris, Jacklyn	Details & Dignity, LLC PO Box 1327 McMinnville, OR 97128	503-437-5275	info@detailsanddignity.com	
	Additional info:			
Jacobs, Alene	Jacobs, Alene PO BOX 606 McMinnville, OR 97128	503-437-4597	jacobsguardian@gmail.com	
Kavanaugh, Connor	Palladio Group / Special Needs Planning 5200 SW Macadam Ave, Ste 450 Portland, OR 97239	503-928-3851	ckavanaugh@financialguide.com	CTFA, ChSNC
Lee, Jason	Senior Citizens Council of Clackamas County, Inc. 812 7th St Oregon City, OR 97045	503-657-1366	jason@seniorcitizenscouncil.com	
Liggett, Bernarda	Coos Elderly Services 390 S 2nd St Coos Bay, OR 97420	541-756-1202	bernarda@cooselderly.org	

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Name	Address	Phone	Email	Certs
Like, DeAnna	Wells Fargo Advisors 805 Broadway St, Ste 747 Vancouver, WA 98660	360-759-4001	deanna.like@wfa.com	
Lockwood, William	Wells Fargo Advisors 805 Broadway St, Ste 747 Vancouver, WA 98660	360-759-4000	william.lockwood@wfa.com	RICP
Lusby, Sheila	Yela Fiduciary Services, LLC Po Box 16518 Portland, OR 97292	503-232-3759	slusby@yelafs.com	
McNeil, Tim	The Elder Law Firm 1015 NW 11th Ave, Ste 243 Portland, OR 97209	503-452-5050	tim@theelderlawfirm.com	
Olson, MaryBeth	Potter Fiduciary Services, Inc. PO Box 80325 Portland, OR 97280	503-245-4420	mbolson@potterfiduciary.com	
Osborne, Cyril	Pegasus Social Services 9955 SE Ash Portland, OR 97216	503-252-8499	cy.osborne@ohcs.org	
Pop, Ligia	LP Associates PO Box 3721 Portland, OR 97208	971-344-4998	lpassociates14@gmail.com	
Risley, Julie	We Create Peace Life Solutions LLC 1607 NE 41st Ave. Portland, OR 97232	503-356-5559	jrisley@wecreatepeace.com	
Rose, Carrie	Senior Citizens Council of Clackamas County, Inc. 812 7th St Oregon City, OR 97045	503-657-1366	carrie@seniorcitizenscouncil.com	

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Rosin, Christopher	Oregon Public Guardian & Conservator 3855 Wolverine St. NE, Ste 6 Salem, OR 97305	503-378-6854	chris.rosin@oregon.gov	
Rowlett, Bryson	Tiffany & O'Shea, Inc. 8305 SE Monterey Ave, Ste 100 Happy Valley, OR 97086	503-233-9800	bryson@tiffanyandoshea.com	
Sands, Tim	The Sands Guardianship LLC 20572 Pine Vista Drive Bend, OR 97702	702-595-9998	tjsands69@gmail.com	
Schneider, Elizabeth	Schneider, Elizabeth 648 NE 9th St Bend, OR 97701	541-728-7120	elizaschneider68@gmail.com	MA Ed
Smith, Scott	Wells Fargo Advisors 5400 Meadows Rd., Suite 200 Lake Oswego, OR 97035	503-603-2141	r.scott.smith@wfadvisors.com	
	<b>Additional info:</b> Manage Court Restricted Investment Accounts			
Tucker, Niki	Pegasus Social Services 9955 SE Ash Portland, OR 97216	503-252-8499	niki.tucker@ohcs.org	LMSW, CMC
	<b>Additional info:</b> We provide quality in-home care services, support services, care management, and health care representation – always endeavoring to meet the client’s needs with highly skilled and compassionate caregivers, care associates, and care managers.			