Exit Planning Institute®
Greater Phoenix Chapter

EPI GREATER PHOENIX CHAPTER:

MEMBER DIRECTORY

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PREMIER ESTATE PLANNING

For over fifty years, Morris Hall, a premier estate planning law firm, has provided quality legal services. The firm has helped tens of thousands of families protect their assets through comprehensive estate planning and estate administration services.

WHY MORRIS HALL

- We have helped preserve the legacies of tens of thousands of families for over 50 years.
- We listen and care for the people we serve, providing plans to protect them, their legacies, and their families.
- We have compassion and empathy for our clients and build lifelong relationships.
- As members of the *American Academy of Estate Planning Attorneys*, our firm offers a wide range of advantages and benefits that place us in a unique position to handle the most complex estate planning and financial matters.

OUR SERVICES

- Wills and Trusts
- Powers of Attorney
- Trust Administration and Probate
- Advanced Estate Planning
- Preparation of Health Care Documents

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LOCAL LEADERSHIP / FOUNDING MEMBERS:

Trace Udall, CFP®, AIF®, CEPA®, Chapter President

Wealth Advisor, Owner at Udall Wealth Mangement
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Web: https://www.udallwm.com/

At Udall Wealth Management, a boutique private wealth management firm, we focus on building strong relationships and prioritizing client education, which sets us apart in the wealth management industry. My roles as the founding member and current president of the Greater Phoenix Chapter of the Exit Planning Institute highlight my commitment to supporting business owners in maximizing the value of their ventures. I am dedicated to managing wealth and empowering clients to achieve their broader life goals. With over 30 years of experience, I am clearly passionate about what I do!

Bruce Hosler, EA, CFP®, CPWA®, AIF®, CEPA®, Chapter Vice-President

Wealth Advisor, Founder at Hosler Wealth Management, LLC
Email: bruce@hoslerwm.com
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Bruce, the founder and principal of Hosler Wealth Management, LLC, with offices in Prescott and Scottsdale, brings over 28 years of experience to the table. He serves pre-retirees, retirees and widows, and business owners with a strong commitment to using advanced tax strategies to help them move toward a tax-free retirement while preserving their wealth. Bruce is credentialed as an Enrolled Agent, CERTIFIED FINANCIAL PLANNER® professional, and Certified Private Wealth Advisor (CPWA®) and as a Certified Exit Planning Advisor (CEPA®), he is uniquely qualified to help business owners prepare for retirement, ensuring financial security and peace of mind as they transition to this new chapter in life.

He is the author of the book MOVING TO TAX-FREE™ Strategies For Creating Tax-Free Retirement Income And Tax-Free Lifetime Legacy Income For Your Children, the host of the Protecting and Preserving Wealth Podcast as well as the MOVING TO TAX-FREE TV Show. Recognized as a top financial advisor by Forbes for seven consecutive years, Bruce continues to be honored as a Chairman's Level advisor in 2024, a distinction given to only 4% of advisors at Commonwealth Financial Network. In 2025 Hosler Wealth Management was awarded the Forbes' Best-In-State Wealth Management Teams.

Outside of work, Bruce enjoys spending time with his wife, Laura. He is also an avid golfer who appreciates the sport's challenges and beauty.

2018-2024 Forbes Best In State Wealth Advisors, created by SHOOK Research. Presented in April 2024 based on data gathered from June 2022 to June 2023. 23,876 were considered, 8,507 advisors were recognized. Not indicative of advisor’s future performance. Your experience may vary. For more information, please visit.

2025 Forbes Best-In-State Wealth Management Teams, created by SHOOK Research. Presented in Jan 2025 based on data as of March 2024. 11,674. Management Teams were considered, approximately 5,300 teams were recognized. Not indicative of advisor's future performance. Your experience may vary. For more information, please visit.

LOCAL LEADERSHIP / FOUNDING MEMBERS:

Amy Morin, MBA, CEPA

Business Consultant, Thriv Coaching
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As a Certified EOS Implementer, Outgrow Sales Advisor and Certified Exit Planning Advisor (CEPA) with a proven entrepreneurial track record, I bring real-world experience to business growth strategy.

My entrepreneurial journey includes co-founding and scaling a company from zero to $40 million in revenue across multiple states, culminating in a successful exit. After successfully exiting my first venture, I acquired a struggling Montana fly-fishing resort where I implemented systematic operational improvements throughout the business. By establishing clear processes, accountability metrics, and modernized systems, I transformed the underperforming property into a highly efficient operation with dramatically improved guest satisfaction and profitability, ultimately positioning it for a lucrative sale.

I don't just teach business growth theory—I've lived it. My approach combines strategic vision with practical implementation, helping business owners build sustainable value and achieve desired outcomes. My goal is to transform businesses from chaotic, reactive, and owner-dependent entities into systematic, proactive, and inherently valuable enterprises systematically transforming their companies from jobs into assets - building transferable value rather than just generating income.

Phil McNulty, CFP®, MPAS®, CEPA®, CRPS, Chapter Vice-President

Wealth Advisor, Verus Capital Partners LLC
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Phil has been in the financial services industry since 2010. He is a Master Planner Advanced StudiesTM designee, currently the highest professional designation in the financial services industry. He earned this in concert with earning his Masters of Science in Personal Financial Planning in 2018. These studies expanded significantly on the topics he studied while becoming a Certified Financial PlannerTM in 2015. Phil believes solid financial planning is the result of understanding each person's unique situation and goals. He is proud to bring years of study and experience to bear on each interaction and works hard to find thoughtful and innovative solutions to every problem. Before working as a Financial Advisor, Phil served two tours in the United States Marine Corps and worked for several years afterward supporting the United States military, both domestically and overseas. He has lived in every time zone in the country and still loves to travel. He believes his diverse background gives him the ability to convey any financial topic into everyday language so his clients can make informed decisions with confidence.

CHAPTER DIRECTORY:

Use the information below to connect and collaborate with local industry experts in the Greater Phoenix area. List organized by Advisor Type.

Attorneys

Tim Hall

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Theron M Hall, Jr. (aka Tim) learned early in life the need of proper management of estates for their preservation. Born and raised in Apache County, Arizona, Tim worked for his parents' title company as a youth, where he gained a lasting appreciation for those who work hard to acquire their estates. Now, as an estate planning attorney, protecting his clients' future through quality legal service has become his hallmark. After graduating cum laude with a Bachelor of Arts degree in English and a Master's degree in Public Administration from Brigham Young University, Tim earned his Juris Doctor degree from the University of Chicago. During his legal studies, he was employed as a research associate with the American Bar Foundation. He is currently a member of the State Bar of Arizona and the Iowa State Bar Association.

Michael Halliday

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Michael Halliday was born and raised in Mesa, AZ. He is the youngest of 4 children. Michael learned early on the importance of establishing a proper estate plan. He witnessed firsthand his mom and aunts fighting over his grandmother's meager estate, causing a rift in their relationship that would last until his aunts died. This experience shaped Michael's focus to ensure individuals and families could avoid this unnecessary trauma and have peace of mind by establishing and maintaining a suitable estate plan. Michael attended Mesa Community College earning an Associates of Arts degree and then graduated from Arizona State University, Cum Laude with a Bachelor of Arts degree in Chinese. During his time at ASU, he participated in a 9-week Chinese language immersion program at the Peoples University in Beijing China. After graduation, he attended Willamette University, College of Law and in 2004. After his first year in law school, he attended a 5-week International Law program at the East China University of Political Science and Law in Shanghai, China

Pacer Udall

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Registered Patent and Trademark Attorney. Pacer is driven by faith in the future and known for his positivity and innovation in creating unique advantages for business owners while securing and leveraging their patents, trademarks, and other intellectual property. He recognizes that you reap what you sow and seeks to propagate impactful patent and trademark strategies and processes in collaboration with clients that grow company value.

Business Consultants

Joe Evers, CPA

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Joe Evers is a CPA with over 30 years of public accounting experience working with a wide variety of clients. He is a partner of Evers Robinson Ltd. in Phoenix, Arizona. Evers Robinson Ltd., which was founded in 1989, provides services to business clients and their owners. Prior to starting his own firm, Joe was a senior manager with KPMG and also held various positions in industry. Joe also taught accounting at a Pennsylvania college for 3 years. As a Certified Exit Planning Advisor (CEPA), Joe assists clients with unlocking their business wealth by identifying areas for profit and valuation improvement. Joe's goal is to help his clients manage and maximize the value of their biggest asset in order to achieve their business and personal goals.

Amy Morin, MBA, CEPA®

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As a Certified EOS Implementer, Outgrow Sales Advisor and Certified Exit Planning Advisor (CEPA) with a proven entrepreneurial track record, I bring real-world experience to business growth strategy.

My entrepreneurial journey includes co-founding and scaling a company from zero to $40 million in revenue across multiple states, culminating in a successful exit. After successfully exiting my first venture, I acquired a struggling Montana fly-fishing resort where I implemented systematic operational improvements throughout the business. By establishing clear processes, accountability metrics, and modernized systems, I transformed the underperforming property into a highly efficient operation with dramatically improved guest satisfaction and profitability, ultimately positioning it for a lucrative sale.

I don't just teach business growth theory—I've lived it. My approach combines strategic vision with practical implementation, helping business owners build sustainable value and achieve desired outcomes. My goal is to transform businesses from chaotic, reactive, and owner-dependent entities into systematic, proactive, and inherently valuable enterprises systematically transforming their companies from jobs into assets - building transferable value rather than just generating income.

Deric Keller

When Deric Keller begrudgingly took a job as a car salesman, he had no idea it would lead to a lifetime of excellence as an entrepreneur and business mentor. Fresh out of the Marine Corps, Deric was struggling with where to go next in his civilian career. Working in sales, he quickly identified a lot that he didn’t like about that model—so he set out to create a completely new, never-seen-before way of doing business in the automotive industry.

Flash forward a few years, and Deric had successfully grown multiple businesses well beyond the multiple 7-figure revenue mark, all while staying true to his keen system of values. It was in the growth of one of these companies that he was first introduced to Exit Momentum. Working with us as a client, he was able to grow his most recent venture, a medical testing lab, to more than $10 Million.

In his own path as a successful serial entrepreneur, Deric discovered a true love for discovering complex problems and breaking them into small, manageable pieces. After witnessing his mastery of the Exit Momentum process firsthand, we brought him on as a coach so he could share his gifts for strategy, simplification, and systematic thinking with our other clients.

Having managed teams of more than 500 people across 14 locations and $500 million in annual revenue, Deric understands firsthand the challenges a rapidly growing business faces. He knows exactly how to get your chaotic growth in check, so you can scale from a place of clarity, accountability, and freedom.

These days, Deric supports the western division of Exit Momentum. His favorite thing about coaching is the look on client’s faces when ‘the lightbulb comes on.’ Excellence is never an Accident.

Brian Suddarth

Business Consultant, Founding National Practice Partner
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Web: https://usc.eragroup.com/

Brian Suddarth is a Founding National Practice Partner dedicated to driving financial growth by optimizing business efficiencies, boosting profits, and enhancing cash flow. With over 20 years of expertise in sales leadership, operational strategy, and entrepreneurship, he specializes in unlocking working capital across healthcare, nonprofit, manufacturing, retail, and distribution sectors. His approach not only drives cost reduction but also significantly improves EBITDA and company valuations, positioning organizations for long-term success. Partnering with ERA Group, a globally recognized consultancy with over 31 years of expertise and 40,000+ projects completed, Brian has helped businesses worldwide save billions. ERA's comprehensive strategies cover more than 50 cost categories, including but not limited to packaging, telecommunications, insurance, and freight. Their self-funded, contingency-fee model ensures clients realize actual savings, while our ongoing auditing and monitoring processes safeguard against future expenditure leakage and maintain the achieved cost reductions.

Tim Young

Business Consultant, Managing Partner at Wealth Point
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As the Managing Partner at WealthPoint, Tim provides his clients consultation on family business, growth, business succession planning, and owner exit strategies. Tim joined WealthPoint at the end of 2010 through the merger of Liquidity Partners, a firm he co-founded in 2006. Tim has over 20 years of experience building a family-owned 2nd generation product and equipment distribution company into a business that employed more than 120 people operating in three states. Tim has held positions ranging from Sales & Marketing to President and CEO. He has been through each phase of the business life cycle from growth and succession to the successful sale of the business to a fortune 500 company. He has spent the last 17 years helping business owners and their stakeholders achieve life changing results.

Lance Meilech

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Merger and acquisition advisor who began working with IBG/FoxFin in 2008. Began business career in sales, representing companies that sell software, and eventually became a securities dealer. Extensive experience in international markets and fluent in multiple languages. As an entrepreneur, started, built and sold several companies, including a software development company and a multi-location education company. Immediately prior to association with Fox & Fin, started and built from the ground up one of Phoenix's top tax firms. Specialist in construction, technology and health care.

CPAs / Accountants / CFOs

Scott Gardner

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Scott Gardner grew up and lives in Mesa, Arizona and is the owner of ASG Consulting. He has a Bachelor's degree in Business and a Master's degree in Accounting. At a young age Scott began working in construction and continued that to put himself through school. Working with small construction companies inspired his passion to help small businesses. After graduation Scott spent 8 years working for a consulting firm that specialized mergers and acquisition for family owned, service-based businesses. Since then, he founded ASG Consulting where his focus is on helping small business owners improve their businesses. When he is not working Scott enjoys camping with his wife and three children and riding dual sport motorcycles.

Julie Shaw, CPA, MBA, CEPA®

CPA, Julie Shaw CFO Consulting , LLC:
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Julie Shaw is an expert financial storyteller. She has nearly forty years of executive finance experience, including twenty-nine years with USA Today Network/Gannett Corporation as Vice President of Finance at the Des Moines Register and the Arizona Republic. Julie's ability to 'explain the story the numbers tell' led Julie to be awarded the Gannett Presidents Ring for Top Executive Leadership five times. Before becoming an entrepreneur and opening Julie Shaw CFO Consulting, LLC, Julie was the Chief Financial Officer for Valley Perinatal Services, which allowed her to witness the challenges and triumphs of running a small business. Julie is a CPA and earned her MBA from Drake University. Julie is also a Certified Exit Planner (CEPA).

Samuel G. Miller, CPA

Tax Manager and CPA at Anthem Strategists
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Website: https://anthemstrategists.com/

Samuel G. Miller, CPA, is a dedicated accounting professional with a passion for numbers and a commitment to helping others achieve their financial goals. With a Bachelor's Degree in Accounting and a CPA designation, Samuel's career began in private industry, where he worked as an accounting assistant and later as an accounting manager for a small business. After gaining hands-on experience in financial operations, he transitioned into public accounting, where he has spent the last 3.5 years refining his expertise. Now a tax manager, Samuel specializes in individual and business tax, accounting, and tax planning, working closely with small businesses to optimize their financial strategies. His analytical mindset and client-focused approach allow him to break down complex financial concepts, empowering business owners to make informed decisions.

Insurance Professionals

Noah Jacobs, WMCP®

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Noah has over 15 years of experience in the life insurance and financial services industries. He serves as the Regional Vice President for Pacific Life's Southwest region in their Independent Financial Planner channel.
Noah partners with independent financial professionals in the Southwest using a proactive consultative approach. His expertise in advanced life insurance solutions can grow financial planning firms, diversify firm revenues and deepen advisor/client relationships. Noah specializes in simplifying creative life insurance strategies to meet the planning needs of high net worth families, executives, business owners, and their professional advisors.

Wealth Managers / Financial Advisors

Karekin Kaprelian, CFP®, ChFC®, CEPA®, CKA®

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Kirk Kaprelian is the founder of Vertex Wealth Advisors. Kirk is a 31-year tenured financial planner specializing in helping business owners, executives, retirees and young professionals achieve their financial goals through investment management, estate planning, business consulting and succession planning, and advanced tax mitigation strategies. Kirk's vision is for his practice to be the most highly sought-after, credentialed team of professionals that embrace innovation, provide financial solutions and comprehensive advice. Kirk received the honor of being inducted into Ameriprise Hall of Fame in 2023. In 2024 and 2025 he won the award of Top 1200 Best In-State Wealth Advisors for Forbes. In addition, he also received the 5 Star Wealth Manager award this year. In previous years, he was also listed on the Barron's Top In-State Wealth Advisors. Kirk received a Bachelor of Science degree in Finance and Marketing from the University of Denver in 1981. He and his wife Zhanet of 32 years, are proud parents of their son Armen and daughter Shoushana.

Steve Deacon, CFP®, CIMA®, CEPA®

Wealth Advisor, Founder at Five Point Wealth Advisors, LLC
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Steve is the founder of Five Point Wealth Advisors, an independent wealth advisory firm, that serves clients across the country. He focuses on providing holistic financial planning to individuals, families and business owners that are tailored to their unique financial needs. What brings him the most joy is seeing the difference he and his team can make in his client's lives. Prior to Steve's transition to personal finance, he had a successful career in corporate finance with ING and BlackRock. Outside of the office, Steve enjoys spending time with his wife, Danielle, their three children, exercising, traveling, and coaching his kid's sports.

Bruce Hosler, EA, CFP®, CPWA®, AIF®, CEPA®, Chapter Vice-President

Wealth Advisor, Founder at Hosler Wealth Management, LLC
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Bruce, the founder and principal of Hosler Wealth Management, LLC, with offices in Prescott and Scottsdale, brings over 28 years of experience to the table. He serves pre-retirees, retirees and widows, and business owners with a strong commitment to using advanced tax strategies to help them move toward a tax-free retirement while preserving their wealth. Bruce is credentialed as an Enrolled Agent, CERTIFIED FINANCIAL PLANNER® professional, and Certified Private Wealth Advisor (CPWA®) and as a Certified Exit Planning Advisor (CEPA®), he is uniquely qualified to help business owners prepare for retirement, ensuring financial security and peace of mind as they transition to this new chapter in life.

He is the author of the book MOVING TO TAX-FREE™ Strategies For Creating Tax-Free Retirement Income And Tax-Free Lifetime Legacy Income For Your Children, the host of the Protecting and Preserving Wealth Podcast as well as the MOVING TO TAX-FREE TV Show. Recognized as a top financial advisor by Forbes for seven consecutive years, Bruce continues to be honored as a Chairman's Level advisor in 2024, a distinction given to only 4% of advisors at Commonwealth Financial Network. In 2025 Hosler Wealth Management was awarded the Forbes' Best-In-State Wealth Management Teams.

Outside of work, Bruce enjoys spending time with his wife, Laura. He is also an avid golfer who appreciates the sport's challenges and beauty.

Jason Hosler, EA, CEPA®

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Jason works as a financial advisor with clients to implement and administer our wealth management process. He has established himself as a primary service advisor for many of our Prescott clients. He has been with the firm for over a decade. Jason continues to take on many challenging roles in the industry to expand his experience thus guiding him down the path of leadership and higher levels of responsibilities. Jason holds Series 7 and 66 FINRA securities registrations. He brings a technological edge to our firm and helps many of our clients stay current in the fast-moving age of the internet. Jason grew up in Prescott and enjoys all it has to offer. He is an avid outdoorsman and golf enthusiast. He loves spending time with his family, his wife Ashley, daughter Emma, and baby James, the newest addition. He also loves to travel, read, and research the lasted updates in technology.

Phil McNulty, CFP®, MPAS®, CEPA®, CRPS, Chapter Vice-President

Wealth Advisor, Verus Capital Partners, LLC:
Email: pmcnulty@veruscapitalpartners.com
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Phil has been in the financial services industry since 2010. He is a Master Planner Advanced StudiesTM designee, currently the highest professional designation in the financial services industry. He earned this in concert with earning his Masters of Science in Personal Financial Planning in 2018. These studies expanded significantly on the topics he studied while becoming a Certified Financial PlannerTM in 2015. Phil believes solid financial planning is the result of understanding each person's unique situation and goals. He is proud to bring years of study and experience to bear on each interaction and works hard to find thoughtful and innovative solutions to every problem. Before working as a Financial Advisor, Phil

Zack Levin, CEPA

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Zack is a Vice President and Financial Advisor at Morgan Stanley and a member of The Levin Group, a team with over 40 years of experience serving High Net Worth and Ultra High Net Worth families, businesses, and business owners. He serves as a trusted partner, guiding clients through life, financial, and business transitions. Zack specializes in helping individuals and business owners preserve and grow wealth, making strategic decisions that position them to achieve their long term goals. With a background in commercial real estate lending, corporate finance, M&A, and strategy consulting, Zack brings a wealth of experience to business owners and their families. He earned a Bachelor's degree in Business and Finance from the USC Marshall School of Business and an MBA from the UCLA Anderson School of Management. Additionally, he holds the Financial Planning Specialist designation from Morgan Stanley. Zack helps business owners confidently navigate the complexities of exit planning, business growth, and wealth management while ensuring their personal and financial goals remain aligned. By collaborating with seasoned professionals in complementary fields, he provides tailored strategies that empower clients to make informed decisions and achieve long-term success.

Kurt Rupprecht, CFP®, CEPA®, RICP®, ChFC®, CASL®, CLU®

Partner and Private Wealth Advisor with K Street Financial
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Born in San Jose, Costa Rica into a Foreign Service family, Kurt spent the majority of his youth residing in Central and South America. Upon completion of high school in Guatemala City, he attended the University of Virginia graduating with a major in Economics and a minor in Foreign Affairs. Following his diverse upbringing, Kurt was naturally drawn to a career involving daily interactions with people of all backgrounds and experiences which led him to a career in the financial services space where he has spent his entire 20+ year professional career. Kurt founded K Street Financial in 2016 alongside his business partner, Jason Colenda, to address the growing needs of their clients, which has evolved into one of the largest and most productive Northwestern Mutual Private Client Group Practices supporting individual professional and business owner clients across the country. Within a growing team of 20 professionals Kurt's role as a Private Wealth Advisor is particularly focused on business and succession planning for closely held businesses owners. Kurt and K Street Financial support various community focused organizations such as Tickets for Kids Charities, Alex's Lemonade Stand, Phoenix Children's Foundation and the Greater DC Diaper Bank. Kurt travels between DC and AZ throughout the year and has three children: Declan, Arizona, and Story. In his spare time you'll find Kurt biking, golfing, hiking or attending a group fitness class such as CrossFit!

Trace Udall, CFP®, AIF®, CEPA®, Chapter President

Wealth Advisor, Owner at Udall Financial
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Perry Buckman

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Perry Buckman is Partner and President of Pathlight Advisors headquartered in Scottsdale, AZ.

He has over 25 years of experience focusing on private client wealth and institutional retirement plan management.

From 2021-2025 Perry has been recognized by Forbes™ Magazine as one of the Best in State Wealth Advisors in Arizona* and 2024-2025 Best in State Wealth Management Teams*. Perry has also held the Platinum Council distinction from 2012-2025. This distinction is held by a select group within Wells Fargo Advisors Financial Network as measured by completion of educational components, business production in the previous year, and professionalism. These designations underscore his ability to understand his clients' aspirations and develop comprehensive and holistic strategies to help achieve those objectives. More importantly, it reflects his focus on earning his clients' trust by offering sound, objective, and professional advice.

Perry holds several industry registrations including being an Accredited Investment Fiduciary (AIF®), Chartered Retirement Plan Counselor (CRPC®), Certified Exit Planning Advisor (CEPA®), Series 7, Series 66, Series 31.

He is also able to incorporate insurance solutions into his clients plans with his variable life and health insurance licenses.

Perry received his Bachelor of Science degree from the University of Arizona. In his free time Perry enjoys traveling and spending time with his family—especially the newest addition to his family, his beloved granddaughter.

Kristin Evans, MBA, CFP, CEPA

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As a CFP ®, I work with successful business owners, executives and families by helping them navigate major life transitions. These include retirement, job change, business sales and transitions, divorce, widowhood, and new family members. Financial success requires collaboration, especially when it comes to complex matters such as taxes, estate planning and business strategy. That's why I strive to foster strong relationships with your attorneys, CPAs and business advisors. Through a comprehensive approach to financial planning, my practice ties the personal and technical sides of money together to help enable clients to stay on track and feel more comfortable and confident with their finances.

Matt MacLean, CFP, ChFC, CKA, CEPA, CRPC

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Matt MacLean is the CEO of his firm and has been helping individuals, business owners, and people of faith navigate their financial futures for over 20 years. He specializes in integrating business planning and exit strategies into broader financial planning, ensuring his clients have a clear roadmap to accomplish what is most important to them.

Matt's approach is deeply rooted in the core values of his firm—Collaboration, Love, Excellence, Accountability, and Resilience (CLEAR). He believes in building lasting relationships with clients, helping them make informed decisions that align with their values, goals, and legacy.

Recognized as a Barron's Top 1,200 Advisor for the past two years, Matt is committed to providing exceptional guidance to those he serves. His passion extends beyond financial planning—he is actively involved in his church, CCV, and dedicates time to mission work. As the founder of Quenched, a nonprofit that builds clean water wells in Nepal and India, he regularly leads mission trips to serve communities in need.

Outside of work, Matt enjoys spending time with his wife Gina and three kids Aiden, Tatum, and Luke. Making memories together is a top priority while living out the values that drive his professional and personal life.

George Hendeson, CFP, CEPA, CIMA, CAIA, CWS

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George is a partner with P.H.X. Wealth Management Group of Wells Fargo Advisors in Phoenix, Arizona. After over a decade of valuable Military Service he successfully transitioned his military experience around leadership, processes, and operations to a career of guarding the wealth of his clients. His expertise focuses around business exit planning and in-depth investment planning. Using that expertise and education to marry financial plans with bespoke investment portfolios; using individual equities, fixed income, and alternative investments to help secure the long term goals of his clients.

Bryan Harnett

VP, Senior Business Development Advisor, Bankers Trust
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Web: bankerstrust.com

Clients are more than just an account or transaction. They're relationships based on trust with exceptional service. As a Senior Business Development Advisor at Bankers Trust, Bryan understands you have banking needs today and financial goals for your future. He is committed to helping you with both.

Having spent more than 20 years in banking, Bryan has the skills and experience to ensure you receive an elite level of service and personalized solutions for your financial needs. Being a native Phoenician and University of Arizona graduate, Bryan has deep roots in the Scottsdale area.

The Bankers Trust Cavasson team looks forward to serving our local clients and expanding your banking relationships. Whether you need wealth management, competitive deposit rates, lending or a customized credit solution, Bryan will go the extra mile to earn your trust and help you achieve your goals with Bankers Trust.

Sam Udall

Wealth Advisor, Udall Wealth Management - Private Client Services
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As a Wealth Management Advisor at Udall Wealth Management, I run our planning software and trading models, and I communicate with clients to gather the necessary information for their financial planning needs. I earned my BA in Financial Planning from Arizona State University, which has provided me with a solid foundation to support our team and clients effectively.

Growing up in Mesa, Arizona, as the youngest son of Trace and Shelly, I have always been inspired by my father's career in financial planning. My motivation stems from the aspiration to follow in his footsteps. The opportunity to learn about trading software and engage in rebalancing and using trading models in clients' households excites me about our business.

At Udall Wealth Management, I am dedicated to helping clients navigate their financial futures while carrying on my family's legacy. I find great joy in interacting with clients and hearing their unique stories, which adds a personal touch to my work. My commitment to the financial industry and the values instilled by my family make me a valuable addition to our team.

Commercial Bankers & Lenders

Natalie Bowers

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With over 25 years' experience in the banking industry, Natalie is currently Vice President, Business Banker for Sunwest Bank. She is a steward of strategic partnerships for commercial clients; mid-large sized organizations; and nonprofits. Natalie's areas of focus include cash flow management, accounts receivables, accounts payables, fraud services, covenant testing, Treasury Payment Solutions, Cash Management, commercial cards, lending, deposit accounts and more. She is a driven professional who promotes servant leadership and financial awareness within her community. She proudly serves on the board for the American Red Cross – Central Arizona chapter..

Charitable Gift Planners

Tiffany House, CAP®, CEPA®, FCEP

Charitable Gift Planning, Tax & Estate Strategist at Exit Preparation, LLC:
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Tiffany House CAP®, CEPA, FCEP, is a tax, estate, and charitable strategist who helps families navigate intricate situations, including selling or transitioning a business, values-based estate planning, tax concerns, and planning philanthropy. She is a fiduciary consultant who collaborates with other advisors to implement planning strategies. Tiffany is a nationally recognized speaker, and she is very active in the community. Her background in the family business of wealth planning for ultra-high-net-worth clients has given her unique experience in tax, estate, and charitable planning strategies.

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Laura S. Leopardi, CPA, ABV, CFF, CGMA, CEPA, MBA is an experienced and credentialed business appraiser serving private business owners, their families, and their professional advisors for 30 years. As a CEPA®, Laura adds value to her firm's business appraisals by incorporating business attractiveness and readiness discussions, investment risk assessment, and best-in-class multiples in her work. Laura values privately-held businesses in connection with exit planning, validating Indications of Interest and Letters of Intent, mergers and acquisitions, strategic and succession planning, and obtaining key person life insurance as well as estate planning, family limited partnerships, and related party property transfers. Laura's experience includes self-employment, an

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