



ARIZONA GRANTMAKERS FORUM

Professional Directory for Funders in Arizona

Professional Advisors and Consultants

Last Updated 12/14/2010

--The following list of professional advisors and consultants is based on recommendations from AGF members. We plan to continue making additions to the list. **If you would like to share a recommendation**, please email Marissa Theisen at mtheisen@azgrantmakers.org. The listing of an individual or company in no way represents or implies an endorsement by the Arizona Grantmakers Forum. We have provided this directory as a courtesy to our members. **Please respect the privacy of your colleagues, and do not give out the information contained on this page to non-members.**

Accounting

<p>Evers Robinson Ltd. Contact: Joe Evers 1300 E. Missouri Avenue, Suite C-100 Phoenix, AZ 85014 (602) 230-9480, ext. 11 joe@eversrobinson.com www.eversrobinson.com Recommended by: <i>Dick Stern, Leo & Marjorie Stern Foundation</i></p>	<p>Henry and Horne, LLP Contact: Charles Inderieden 7098 E. Cochise Road, Suite 100 Scottsdale, AZ 85253-4517 (480) 483-1170 chucki@hhcpa.com www.hhcpa.com Recommended by: <i>Denise Higgins, Ibis Foundation of Arizona</i></p>
<p>Eide Bailly LLP Contact: Randy Fitzpatrick 1850 N. Central Avenue, Suite 400 Phoenix, AZ 85004 (602) 264-5844 http://www.eidebailly.com Recommended by: <i>John Muessle, Arizona Foundation for Educational Advancement</i></p>	<p>CBIZ MHM, LLC (Miller Wagner) Contact: Brenda Blunt 3101 N. Central Avenue, Suite 300 Phoenix, AZ 85012 (602) 264-6835 bblunt@cbiz.com www.cbiz.com/cbizmhm-phoenix Recommended by: <i>Jon Munson, Stardust Foundation</i></p>
<p>Wendtland & Associates Contact: Richard K. Wendtland 2990 E. Ft Lowell Tucson, AZ 85716 (520) 323-7600 rick@tax.psemail.com Recommended by: <i>Lew Riggs, Tucson Osteopathic Medical Foundation</i></p>	

Auditing/Tax Preparation

<p>CBIZ MHM, LLC (Miller Wagner) 3101 N. Central Avenue, Suite 300 Phoenix, AZ 85012 (602) 264-6835 Contactcbizmhm@cbiz.com www.cbiz.com/cbizmhm-phoenix Recommended by: <i>Don Snider, The Flinn Foundation</i></p>	<p>Clifton Gunderson, LLP Contact: Richard Goldenson 3003 N. Central Avenue, Suite 500 Phoenix, AZ 85012 (602) 266-2248 Richard.Goldenson@cliftoncpa.com www.cliftoncpa.com Recommended by: <i>Don Snider, The Flinn Foundation</i></p>
<p>Deloitte & Touche 2901 N. Central Avenue, Suite 1200 Phoenix, AZ 85012-2799 (602) 234-5100 www.deloitte.com Recommended by: <i>Don Snider, The Flinn Foundation</i></p>	<p>Ernst & Young One Renaissance Square, Suite 2300 Phoenix, AZ 85004 (602) 322-3000 www.ey.com Recommended by: <i>Don Snider, The Flinn Foundation</i></p>
<p>Henry and Horne, LLP 7098 E. Cochise Road, Suite 100 Scottsdale, AZ 85253-4517 (480) 483-1170 www.hhcpa.com Recommended by: <i>Don Snider, The Flinn Foundation</i></p>	

Succession Planning

<p>Human Side of Enterprise, LLC Contact: Leslie Dashew, President 21839 N. 98th Street Scottsdale, AZ 85255 (480) 419-4243 (866) 419-4243 (Toll Free) LDashew@aol.com www.lesliedashew.com [Psychological and sociological aspects] Recommended by: <i>Dick Stern, Leo & Marjorie Stern Foundation</i> <i>Carol Peck, Rodell Charitable Foundation of Arizona</i></p>	<p>Braun Siler Kruzel PC Contact: Gregory M. Kruzel, Partner 14811 N. Kierland Boulevard, Suite 500 Scottsdale, AZ 85254-2750 (480) 367-3362 gkruzel@bskarizonalaw.com www.bskarizonalaw.com [Legal aspects] Recommended by: <i>Dick Stern, Leo & Marjorie Stern Foundation</i></p>
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Strategic Focus/Planning

<p>Partners in Participation Contact: John Oyler 4220 N. 25th Street Phoenix, AZ 85016 (602) 955-4811 joyler@ica-usa.org Recommended by: <i>Dennis Ichikawa, Casey Family Programs</i></p>	<p>Peak Performance Consulting Corp. Contact: Joyce Friel 11353 E. Raintree Drive Scottsdale, AZ 85255 (480) 236-4266 (Cell) joyce@peakperformancecorp.com www.peakperformancecorp.com Recommended by: <i>Terri Wogan, Social Venture Partners AZ</i></p>
<p>Dr. Gloria Burgess PO Box 777 Edmonds, WA 98020-0777 (206) 954-0732 gloria@jazz-inc.com Recommended by: <i>Dennis Ichikawa, Casey Family Programs</i></p>	<p>Positive Options, Inc Dr. Kenneth H. Kasner PO Box 25306 Phoenix, AZ 85002 (602) 357-4399 www.positiveoptions.net Recommended by: <i>Crystal Thompson, Central AZ Project</i></p>
<p>Vaughan Consulting Group Contact: Greg Vaughan 6279 E. Wilshire Drive Scottsdale, AZ 85257 (480) 990-1715 info@vaughanconsulting.com www.vaughanconsulting.com Recommended by: <i>Gene D'Adamo, Arizona Republic</i></p>	<p>The Philanthropy Group 3301 E. Glenrosa Avenue Phoenix, AZ 85018 (602) 380-2478 info@phoenixphilanthropy.com www.phoenixphilanthropy.com Recommended by: <i>Marianne Pekala, CHW Foundation</i></p>
<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i> <i>Patricia Miles, McMiles Foundation</i></p>	<p>Jeffrey M. Glebocki P.O. Box 37254 Tucson, AZ 85740 (520)887-5701 www.jeffglebocki.com Recommended by: <i>Steve Mittenthall, Ellis Center for Educational Excellence</i></p>

Capacity Building

<p>The Lodestar Center Arizona State University University Center - Mail code 4120 411 N. Central Ave, Suite 500 Phoenix, AZ 85004-0691 (602) 496-0500 nonprofit@asu.edu www.asu.edu/copp/nonprofit Recommended by: <i>Marianne Pekala, CHW Foundation</i></p>	<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i> <i>Patricia Miles, McMiles Foundation</i></p>
<p>Jeffrey M. Glebocki P.O. Box 37254 Tucson, AZ 85740 (520)887-5701 www.jeffglebocki.com Recommended by: <i>Steve Mittenthal, Ellis Center for Educational Excellence</i></p>	

Board Development & Management

<p>Partners in Participation Contact: John Oyler 4220 N. 25th Street Phoenix, AZ 85016 (602) 955-4811 joyler@ica-usa.org Recommended by: <i>Dennis Ichikawa, Casey Family Programs</i></p>	<p>The Kushner Companies Contact: David Kushner 111 Newlands Street Chevy Chase, MD 20815 (301) 655-5467 david@thekushnercompanies.com www.thekushnercompanies.com Recommended by: <i>Lew Riggs, Tucson Osteopathic Medical Foundation</i></p>
<p>Dr. Gloria Burgess PO Box 777 Edmonds, WA 98020-0777 (206) 954-0732 gloria@jazz-inc.com Recommended by: <i>Dennis Ichikawa, Casey Family Programs</i></p>	<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i> <i>Patricia Miles, McMiles Foundation</i></p>
<p>Jeffrey M. Glebocki P.O. Box 37254 Tucson, AZ 85740 (520)887-5701 www.jeffglebocki.com Recommended by: <i>Steve Mittenthal, Ellis Center for Educational Excellence</i></p>	

Mission or Program Related Investing

<p>The F.B. Heron Foundation Contact: Luther M. Ragin, Jr. 100 Broadway, 17th Floor New York, NY 10005 (212) 404-1800 info@fbheron.org www.fbheron.org Recommended by: <i>The Arizona Community Foundation</i></p>

Mission Alignment

<p>Partners in Participation Contact: John Oyler 4220 N. 25th Street Phoenix, AZ 85016 (602) 955-4811 joyler@ica-usa.org Recommended by: <i>Dennis Ichikawa, Casey Family Programs</i></p>	<p>Dr. Gloria Burgess PO Box 777 Edmonds, WA 98020-0777 (206) 954-0732 gloria@jazz-inc.com Recommended by: <i>Dennis Ichikawa, Casey Family Programs</i></p>
<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i> <i>Patricia Miles, McMiles Foundation</i></p>	<p>Jeffrey M. Glebocki P.O. Box 37254 Tucson, AZ 85740 (520)887-5701 www.jeffglebocki.com Recommended by: <i>Steve Mittenhall, Ellis Center for Educational Excellence</i></p>

Corporate Citizenship

<p>BSR 111 Sutter Street, 12th Floor San Francisco, CA 94104 (415) 984 3200 connect@bsr.org www.bsr.org Recommended by: <i>Angie Harmon, Freeport-McMoRan Copper and Gold Inc</i></p>	<p>Boston College Center for Corporate Citizenship Carroll School of Management 55 Lee Road Chestnut Hill, MA 02467-3942 (617) 552-4545 ccc@bc.edu www.bccccc.net Recommended by: <i>Angie Harmon, Freeport-McMoRan Copper and Gold Inc</i></p>
<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i> <i>Patricia Miles, McMiles Foundation</i></p>	

Fundraising

<p>Institute for Charitable Giving Contact: Gerald Panas 500 N. Michigan Ave., Ste. 2008 Chicago, IL 60611 (800) 234-7777 www.instituteforgiving.org</p>
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Insurance Brokers

<p>Hub International Contact: Tina Yont or Dana Moeller 1750 E. Glendale Avenue Phoenix, AZ85020 Phone: (602) 395-9111 tina.yont@hubinternational.com dana.moeller@hubinternational.com www.hubinternational.com/hubarizona/index.aspx</p>

Research

<p>West Group Research Contact: Kathryn DeBoer 2702 N. 44th Street, Suite 100-A Phoenix, AZ 85008 (602) 707-0050 (800) 999-1200 (Toll Free) www.westgroupresearch.com Recommended by: <i>Lew Riggs, Tucson Osteopathic Medical Foundation</i></p>	<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i> <i>Patricia Miles, McMiles Foundation</i></p>
<p>Jeffrey M. Glebocki P.O. Box 37254 Tucson, AZ 85740 (520)887-5701 www.jeffglebocki.com Recommended by: <i>Steve Mittenthal, Ellis Center for Educational Excellence</i></p>	

Grants Process/Back Office Support

<p>Foundation Source Contact: Michael Hogan Mountain & Southwest Region (303) 665-5079 (303) 810-1500 (Cell) mhogan@foundationsource.com www.foundationsource.com Recommended by: <i>Tom Chauncey, Chauncey Foundation</i> <i>Juanita Francis, F2 Family Foundation</i></p>	<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i> <i>Patricia Miles, McMiles Foundation</i></p>
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Technology

<p>Hughes-Calihan Konica Minolta, Inc. 4730 N. 16th Street Phoenix, AZ 85016 (602) 264-9631 (800) 352-3040 www.hughes-calihan.com Recommended by: <i>Don Snider, The Flinn Foundation</i></p>	<p>InteliCommunities Contact: Chuck Matthews 6263 N. Scottsdale Road, Suite 255 Scottsdale, AZ 85250 (480) 444-7080 CMatthews@icilink.com www.intellicommunities.com</p>
<p>Logistix Group Eric Chiaramonte 8233 W. Country Gables Drive Peoria, AZ 85381 (623) 234-2000 www.itlogistixs.com</p>	<p>Rhino Internet Solutions 1095 W. Rio Salado Parkway, Suite 205 Tempe, AZ 85281 (480) 784-1676 http://rhinointernet.com/index.shtml</p>
<p>Additional Web/Technology Rhino http://rhinointernet.com/ Cibola Creative www.cibolacreative.com/ A to Z Web Builders www.azwebbuilders.com/ TechSoup http://home.techsoup.org</p>	

Communications

<p>Message Point Communications Contact: Bill Hiniker 6721 W. Behrand Drive Glendale, AZ 85308 (623) 825-3125 whiniker@cox.net Recommended by: <i>Don Wilt, Honeywell Aerospace</i></p>	<p>Park & Co Contact: Park Howell 4144 N. 44th Street, Ste A-2 Phoenix, AZ 85018 (602) 957-7323 park@parkandco.com www.parkandco.com Recommended by: <i>Terri Wogan, Social Venture Partners AZ</i></p>
<p>Master Your Message (InterSpeak, LLC) Contact: Kathy Kerchner 4234 N. Winfield Scott Plaza Scottsdale, AZ 85251 (480) 949-8750 www.MasterYourMessage.com Recommended by: <i>Gene D'Adamo, Arizona Republic</i></p>	<p>The Rozelle Group Ltd Dr. Martha A. Rozelle Phoenix, AZ (602) 224-0847 Recommended by: <i>Crystal Thompson, Central AZ Project</i></p>
<p>Laura's Ink Contact: Laura Atwell 28248 N. Tatum Boulevard, Suite B1-234 Cave Creek, AZ 85331 (480) 585-4129 Lauras_Ink@cox.net Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation and Patricia Miles, McMiles Foundation</i></p>	

Legal

<p>Ballard, Spahr, Andrews & Ingersoll Contact: Tom Duncan 1225 17th Street, Suite 2300 Denver, CO 80202 (303) 296-3956 <i>Phoenix Office</i> 3300 Tower, Suite 1800 3300 N. Central Avenue Phoenix, AZ 85012 (602) 798-5400 www.ballardspahr.com Recommended by: <i>John Muessle, Arizona Foundation for Educational Advancement</i></p>	<p>Collins, May, Potenza, Baran & Gillespie, P.C. Contact: Austin D. Potenza II Chase Tower, 22nd Floor 201 N. Central Avenue Phoenix, AZ 85004-0608 (602) 252-6555 apotenza@cmpbglaw.com www.cmpbglaw.com Recommended by: <i>Preston McMurry, Jr, Theresa's Fund</i></p>
<p>Fennemore Craig 3003 N. Central Avenue, Suite 2600 Phoenix, AZ 85012-2913 (602) 916-5000 (Main) www.fclaw.com Recommended by: <i>Carolyn O'Malley, Dorrance Family Foundation</i></p>	
<p>Contact: Kendis Muscheid (602) 916-5354 kmuscheid@fclaw.com</p>	<p>Contact: Laura LoBianco (602) 916-5345 llobianco@fclaw.com</p>
<p>Carter Law Group, P.C. Contact: Ellis M. Carter, J.D., LL.M in Taxation 2375 E. Camelback Road, 5th Floor Phoenix, AZ 85016 (602) 456-0071 ellis@carternonprofitlaw.com www.carternonprofitlaw.com Recommended by: <i>Don Snider, The Flinn Foundation</i></p>	

Investment Advisors

<p>Stellar Capital Management, LLC Contact: Richard D. Stern, CFA, Managing Member 2200 E. Camelback Road, Suite 130 Phoenix, AZ 85016-3345 (602) 778-0307 rstern@stellarmgt.com www.stellarmgt.com Recommended by: <i>Dick Stern, Leo & Marjorie Stern Foundation</i></p>	<p>Canterbury Consulting Contact: Michael Laven, Managing Director 660 Newport Center Drive, Suite 300 Newport Beach, CA 92660 (800) 888-4551 (949) 718-2227 Recommended by: <i>Jerry Wissink, BHHS Legacy Foundation</i></p>
<p>US Trust Bank of America Private Wealth Management Contact: Mark Weisbrod 201 E. Washington Street, 23rd Floor Phoenix, AZ 85004-2343 (602) 523-2614 (866) 698-1161 mark_weisbrod@ustrust.com Recommended by: <i>Denise Higgins, Ibis Foundation of Arizona</i></p>	<p>Merrill Lynch Global Wealth Management Contact: Marjorie G. Hoffman 6730 N. Scottsdale Road, Suite 150 Scottsdale, AZ 85253 (480) 607-8768 (800) 925-0575 (Toll Free) marjorie_hoffman@ML.COM www.totalmerrill.com Recommended by: <i>Denise Higgins, Ibis Foundation of Arizona</i></p>
<p>Bank of America Senior Philanthropic Service Officer Contact: John Ostler (213) 621-7353 Recommended by: <i>Denise Higgins, Ibis Foundation of Arizona</i></p>	<p>Northern Trust Bank 2398 E. Camelback Road, Suite 400 Phoenix, AZ 85016 (602) 468-1650 www.northerntrust.com Recommended by: <i>Sandi Perez, Delta Dental of AZ Foundation</i></p>
<p>Merrill Lynch Contact: Matthew Richeda 200 Josephine Street Denver, CO 80206 (720) 941-2093 www.totalmerrill.com Recommended by: <i>John Muessle, Arizona Foundation for Educational Advancement</i></p>	<p>The Investment Fund for Foundations (TIFF) Four Tower Bridge 200 Barr Harbor Drive, Suite 100 West Conshohocken, PA 19428 (610) 684-8000 info@tiff.org www.tiff.org Recommended by: <i>Don Snider, The Flinn Foundation</i></p>
<p>Cambridge Associates LLC 2001 Ross Avenue, Suite 2600 Dallas, TX 75201 (214) 468-2800 www.cambridgeassociates.com Recommended by: <i>Don Snider, The Flinn Foundation</i></p>	<p>Strategic Wealth Advisors Contacts: Laurie & John Bagley 8426 E. Shea Boulevard, Scottsdale AZ, 85260 (480) 998-1798 www.xpertadvice.com/new/xpertadvice/default.asp</p>
<p>Inlign Wealth Management LLC Contact: Mark D. Feldman 2355 East Camelback Road, Suite 750 Phoenix, AZ 85016 (602) 385-3266 www.inlignwealth.com</p>	

National Consultant/Advisor Search Engines

<p>National Network of Consultants to Grantmakers <i>Online searchable data base of consultants</i> http://www.nncg.org/directory/search/</p>	<p>Association of Small Foundations <i>Professional Directory of Professional Advisors</i> http://www.smallfoundations.org/site/apps/kb/cs/contactsearch.asp?c=fvKRI7MPJqF&b=3531651</p>
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