

January 2024

Dear Clients,

Hope this letter finds you well. Many of my clients have asked for referrals for professional in related fields. I am pleased to refer the following individuals. I know each well and I have confidence they can provide personalized professional service and the highest standards.

Trust & Estate Planning

Randy Spiro
9100 Wilshire Blvd #535E
Beverly Hills, CA 90212
Phone (310) 275-4475
RSpiro@earthlink.net

Megan Ferkel Earhart
Jeffer Mangels Butler & Mitchell LLP | JMBM
1900 Avenue of the Stars, 7th Floor
Los Angeles, CA 90067
Phone (310) 785-5328
MEarhart@JMBM.com

Investment Advisor

Kary Bartmasser, RIA
KB Wealth Management Group
8913 W Olympic Blvd., Suite 205
Beverly Hills, CA 90211
Phone (424) 249-3360
Kary@bartmasserria.com
www.kbwealthmanagementgroup.com

Life & Health Insurance

Zachary Blume, CFP
Price, Raffel & Browne
Phone (310) 551-6040
Zblume@prbinc.com