

# LAUREN HAUPTMAN **INK**

COPYWRITING  
EDITING & PROOFREADING  
MARKETING COMMUNICATIONS  
PUBLICATION & MAGAZINE CONSULTING  
BRANDING & STYLE  
DESIGN

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## **BUILDING BETTER BUSINESS STORIES THROUGH WORDS AND PICTURES**

LAUREN HAUPTMAN **INK** offers editorial, design and creative services for a wide variety of projects across industries. We are particularly adept at translating business-speak to people-speak. LAUREN HAUPTMAN **INK** handles all aspects of your marketing communications, from conception to fruition, *on time and within budget*.

### **COPYWRITING**

*print & online: we write pretty much anything and everything*

- make your marcom materials sing, yell or whisper to achieve your goals
- increase funds, awareness, buzz
- tell customers, travelers, visitors what to do and how to do it
- hire your very own ghost to write under your very own byline

### **EDITING & PROOFREADING**

- from ad copy to Web content to feature stories to scripts to novels
- make sure what's written is perfect — or, at least, grammatically correct

### **DESIGN**

- all print media: from marketing promotions, brochures and ad copy; to newsletters and invitations; to reviews, columns and feature stories; to press releases, sell sheets and fund-raising materials; to PowerPoint presentations
- digital media, including e-newsletters and ads

### **BRANDING & STYLE**

- rules are good: a branding & style guide ensures materials are correct, cohesive and brand-compliant
- brand consistency is essential for every successful publication, business and organization

### **PUBLICATIONS**

- newsletters to magazines to reports (print and electronic), from conception to fruition, brainstorming to bindery
- make yours look better, sound better, work better

# Grazia Bennett



**W**hether you are seeking a pied-à-terre on Nob Hill, a mansion in Pacific Heights or a condo in SoMa, Grazia Bennett will listen to your needs and expertly guide you in the search for your perfect home. She has extensive listing and selling experience, and she excels in valuing and marketing a property through to completion of the sale. Grazia has earned a place in the Top Agent Network, which represents the top 10 percent of agents in San Francisco and gives her access to exclusive pre-market properties for her clients.

## Relationships & Real Estate

Grazia believes in nurturing client relationships above all else; she is always accessible with advice and expertise to make your real estate experience smooth, calm and easy.

Never pushy and always patient, she brings clarity and civility to the often-daunting task of buying or selling a property. If you are a buyer, she will help you find the right property and make a sound investment. If you are a seller, she will sell your property in the shortest time and at the highest price possible. Whether you are dealing with a multi-million-dollar estate or a studio apartment, Grazia gives you undivided attention. She brings a lifetime of hard work, integrity and empathy to each and every situation.

## Business & Culture

More than a decade in investment banking instilled in Grazia the language of business; she has a special knack for helping executives and entrepreneurs buy and sell properties. Living and working all over the world taught her to work with people from different cultures; she is renowned among international clients for her expertise in navigating the complexities of the U.S. real estate market.

With the strength of Sotheby's International Realty behind her, Grazia ensures clients will benefit from effective negotiating, smooth transactions and access to a vast global network. This network connects Grazia with the best realtors around the world when clients seek to buy or sell properties nationally or globally.

## Community & Passion

A native of Italy, Grazia holds a JD from the University of Milan, as well as an MA in international economics and international relations from Johns Hopkins University. She is deeply rooted in the San Francisco Bay Area, and her community work revolves around three passions: entrepreneurship, international relations and financial education. She volunteers tirelessly for The Business Association Italy America (BAIA) and Bizworld.org.

## Sotheby's

INTERNATIONAL REALTY

117 Greenwich St., San Francisco, CA 94111

grazia.bennett@sothebyshomes.com

415.294.4244

[www.graziabennett.com](http://www.graziabennett.com)



### INSURANCE PRODUCTS

- | Workers' Compensation
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- | Professional Liability (E&O)
- | Directors & Officers (D&O)  
including Fiduciary Liability
- | Employment Practice  
Liability Insurance (EPLI)
- | Auto Fleets
- | Inland/Ocean Marine

Joe DeLucchi helps privately held and nonprofit entities transfer risk through insurance solutions. He specializes in long-term relationships, ensuring every client has the best possible protection at the best possible price.

### **CAL doesn't sell insurance; they buy it.**

Joe sees himself as a broker in the truest sense of the word, purchasing policies and programs from different carriers to best meet clients' needs. CAL buys insurance on your behalf; they don't sell it. Joe's team has deep expertise in a wide range of insurance products and coverages to ensure you have the right advisers, solutions and protection. They are known for asking — and answering — a lot of questions to determine your needs and expectations. Then they exceed them.

### **Deep roots mean deep responsibility.**

Like its born and bred president, CAL has deep roots in San Francisco. Joe joined CAL out of Santa Clara University in 1998, working his way up to become president and CEO in January 2016. His clients are his neighbors — no matter where they are in the United States — and he takes great pride in having one of the highest client-retention rates in the Bay Area.

Joe has been involved in many community organizations, including the Bank of San Francisco Advisory Council, BAYCAT, ProVisors, Council of Business Advisors, CNA Insurance PACER Board, Liberty Mutual Agent's Advisory Council, Professional Property Management Association and Leadership San Francisco.

### **The best coverage and the best service at the best price.**

Whether you need a fresh take on one policy or an overhaul of your entire portfolio, Joe and his team of experts access a full spectrum of services and insurance products to craft creative, yet sensible, solutions. Their longstanding relationships with carriers translate to bottom-line advantages for clients. Your team at CAL vets policy language and negotiates on your behalf to ensure you get the best coverage at the lowest cost.

Your protection, well-being and satisfaction are Joe's priority. Whatever your needs are, he will be happy to discuss how CAL Insurance can help you buy better protection and risk management for your business.

### **ALWAYS LOOKING OUT FOR YOU**

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415-680-2124 | CELL 415-420-0576 | CA LIC 0C34583  
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# LIFEGUARD WEALTH

*A Smarter Approach to Wealth Management*

Our philosophy is simple: provide superior investment solutions and wealth advice without bias.

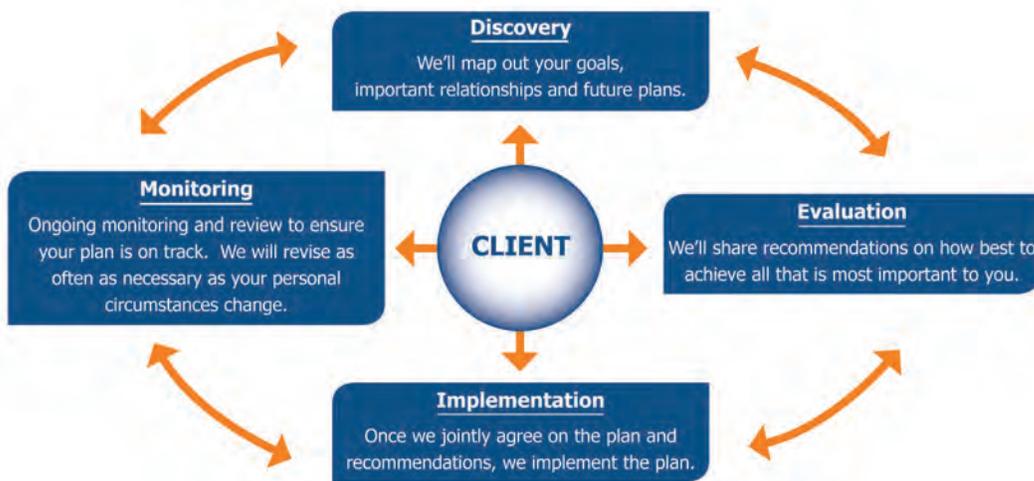
Lifeguard Wealth helps affluent individuals and families manage their money. We believe we have created a better experience for our clients with our highly individualized wealth services, uniquely tailored to each client's needs.

Think of us as your financial lifeguard — ensuring all aspects of your financial life are covered and protected.

Wealth is more than just the accumulation of money and resources. It is the measure of your quality of life and all the things that bring you joy and happiness: family, your home, travel, adventure, hobbies and ways you give back to your community.

Whatever wealth means to you and whatever your own goals and dreams, you need a solid financial plan in place to make wise decisions that will let you achieve them. Real wealth management is a comprehensive, expert approach that addresses your entire financial picture.

## Our Comprehensive Wealth Management Process



This is where Lifeguard Wealth comes in. We begin each client relationship with a "discovery meeting," then progress through a series of planning and check-in sessions to help us most efficiently advise you on your money. It is an ongoing process and journey we undertake together.

Lifeguard Wealth helps each client navigate the uncertainties of the markets and adequately plan for a secure, prosperous future.



ProVisors  
Group Leader - SFT

**Joe Delaney**  
Managing Director

Joe Delaney founded Lifeguard Wealth to help others realize their goals and dreams. He is dedicated to putting his clients first and creating and executing wealth management strategies for individuals and families.

Joe has more than 30 years of financial-industry experience as a CPA and CFO; he has held senior positions with institutional investment and wealth management firms. He has a BA in economics from Stanford University and an MBA in finance from UCLA Anderson.

A Southern California native, Joe spent many summers as an ocean lifeguard, which had a profound impact on him. Being given the opportunity to literally save lives with countless rescues — and being in charge of the safety of everyone on his watch — instilled in Joe a "lifeguard mentality" he carries with him always.

## LIFEGUARD WEALTH

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**Shwiff, Levy & Polo, LLP**  
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## **Elizabeth H. Shwiff**

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*Certified Public Accountant (CPA)*  
*Certified Fraud Examiner (CFE)*  
*Personal Financial Specialist (PFS)*  
*Certified Financial Planner (CFP)*  
*Accredited Estate Planner (AEP)*

**E**lizabeth Shwiff is on a mission to earn respect each and every day. Her vast experience, deep-rooted honesty and tireless efforts on behalf of her clients permeate every aspect of her CPA and financial-services practice.

### **DEDICATION, TRUTH, INTEGRITY**

A career spent honing her innate problem-solving skills, coupled with her unyielding dedication to finding the truth, has earned Shwiff a reputation for relentless client representation. She is known as a formidable opponent to entities ranging from the IRS to the Franchise Tax Board to the U.S. Department of Treasury to foreign governments. She is a sought-after expert witness and partner for litigation teams worldwide, having developed an unparalleled depth of expertise, breadth of knowledge and unimpeachable credibility in a variety of environments, from boardrooms to courtrooms.

As managing partner and director of practice development for the CPA firm of Shwiff, Levy & Polo, LLP, Shwiff leads a team of financial professionals who share her commitment to providing comprehensive financial services with integrity. The firm specializes in handling complex financial matters, ensuring they always do what is both necessary and right for each client.

Unique among CPA firms, Shwiff, Levy & Polo prioritizes client care above all else. They do not rest until clients' needs are met, from providing tax advice to accounting services to fraud investigations.

### **VALUE, EXPERTISE, MISSION**

Elizabeth Shwiff has worked around the world for the U.S. State Department and other entities; she is an expert in linguistics and speaks four languages; she holds a master's degree in taxation, among other degrees. She founded her firm in 1989 with a mission to provide clients with the highest value, deepest expertise and best service. It is a mission Shwiff, Levy & Polo fulfills each and every day.



# NOOSHI NADERI

[www.nooshi.com](http://www.nooshi.com)

Nooshi Naderi brings an unusually calm presence to buying and selling homes. She combines this with decades of financing experience and a deep knowledge of the San Francisco real estate market, to ensure your journey is efficient, effective and easy. Nooshi employs a comprehensive approach to finding you the right residence or investment that fulfills your needs and wishes, or to selling your property at the highest price in the shortest amount of time.

## BUY BETTER

### **Neighborhood & Market Know-How.**

Nooshi specializes in the San Francisco residential market, giving you an edge in an always-competitive landscape, as well as an insider's view of the city's diverse neighborhoods.

### **Financing Expertise.**

Nooshi draws on her background in mortgage lending, an expansive network and experience in one of the nation's most challenging markets, to craft clean, creative financing and offer documents that maximize acceptance.

### **Effortless Process.**

Nooshi works tirelessly to make the often-stressful process of buying a home easy and effortless. She takes the time to learn what you want and need, then does all the legwork, so your valuable time is spent seeing homes that meet and exceed your expectations, until you find your perfect place.

## SELL SMARTER

### **Unique marketing for unique homes.**

Nooshi creates a multifaceted, individualized sales plan for your property — including its own website — leveraging the unparalleled resources of the industry-leading Paragon Real Estate Group to market your residence.

### **Setting the stage.**

Nooshi combines a passion for design, a talent for visualization and a team of consummate professionals — from stagers to carpenters to gardeners — to ensure your property is enticing and desirable to potential buyers.

### **The right asking price.**

Nooshi calls on her many years of experience in banking and finance to determine the right asking price for your property. Serious buyers will not make offers on overpriced properties; the right price generates interest, more bids and a higher final selling price.

Nooshi Naderi offers her clients a unique combination of heart and head. She is always positive and never pushy, deeply compassionate and unfailingly honest. She is also a tenacious negotiator with extensive analytical skills and financial expertise. From project proposal to closing, Nooshi ensures you have the strongest, most knowledgeable representation, and the easiest, least stressful buying and selling transactions.



**PARAGON**  
REAL ESTATE GROUP

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License No. 01268662

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## David Grisham

Certified Public Accountant  
Certified in Financial Forensics

### Notable Cases

**Expert** for Portola Valley School District: Investigation into possible wrongdoing by district superintendent. Superintendent eventually pleaded “no contest” to multiple felony charges.

**Expert** for a water district (plaintiff): Prepared damage claim pursuant to costs incurred in the remediation of a chemical leaking into the water supply from defendant’s flare manufacturing facility.

**Expert** for government defense contractor (defendant): Prepared alternative claim due to loss of a contract of the client’s subcontractor.

**Consultant** in a dispute between two defense contractors in the sales of fighter jets to the US Navy and foreign entities: Determined cost of construction and equitable treatment of subcontractor in allocating costs.

**Consultant** for family trust attorney: Ascertained whether the trustees for a family trust had properly invested and accounted for money during an eight-year period.

**Forensic accountants do not deal with dead people.**

**We utilize accounting, auditing and investigative skills to communicate financial information clearly and concisely in a courtroom or legal setting.**

Now that that’s cleared up, here are some important things to know about David Grisham, forensic accountant:

- He is involved and invested in every investigation, from soup to nuts, discovery through deposition through testimony — whether he is the team or is leading a team he has assembled.
- He is committed to uncovering the facts for every client in the most efficient and effective way possible.
- He learns as much as possible about each business he is investigating — not just what they do, but how they do it.
- He translates accounting and investigative terminology into plain English, ensuring clients, judges and juries understand and trust his findings, conclusions and opinions.
- He enjoys working with people and numbers (really, he does). His expertise and knowledge is enhanced by his honesty and sense of humor.

David is a partner in the forensic accounting practice of San Francisco-based Hemming Morse LLP, a pioneer in the field. He maximizes the firm’s collaborative approach and unparalleled depth and breadth of knowledge for his clients. David started his career as a financial auditor; he has served as a manager for a Big Four firm, as well as for a Silicon Valley start-up, giving him a unique, 360-degree business perspective he brings to every case.

In 20 years as a forensic accountant, David has earned a reputation for his honest, straightforward approach, thorough investigations and analyses, and understandable, trustworthy conclusions.



David Grisham  
415.836.4050  
grishamd@hemming.com

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# LAW OFFICES OF JOHN T. HENDRICKS

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## JOHN T. HENDRICKS

Following years of litigation practice representing Fortune 500 companies and their management, John Hendricks founded the Law Offices of John T. Hendricks to provide businesses with the highest level of legal expertise and services, complemented by an unparalleled commitment to leverage the latest technology — all to give his clients the best possible representation.



JOHN T. HENDRICKS

### Admitted to the State Bar of California

#### Practice Areas

Employment, Real Estate, Business

#### Education

BA, political science, UCLA  
JD, University of San Francisco School of Law  
*Phillip C. Jessup International Law Moot Court Team*  
*John L. Brennan Award for trial advocacy*  
*Certificate in International Law, with honors*

#### Court Admissions

California State Courts  
US District Court, *Northern, Eastern and Southern Districts of California*

#### Affiliations & Memberships

American Bar Association  
American Inns of Court  
National LGBT Bar  
Bar Association of San Francisco  
Bay Area Lawyers for Individual Freedom  
AIDS Legal Referral Panel

#### Designations

NITA Advocate/Martindale-Hubbell

Mr. Hendricks' practice focuses on the areas of employment, real estate and business law. He advocates on behalf of clients in the airline, banking, construction, healthcare, insurance, Internet, oil, restaurant, technology and telecommunications industries. He practices in state and federal courts throughout California, focusing on defending single- and multi-plaintiff employment discrimination, harassment, unfair competition and wrongful termination claims. His skills in trial advocacy were recognized when he was awarded the NITA Advocate designation by the National Institute for Trial Advocacy in 2007.

Before attending law school, Mr. Hendricks served as a legislative aide in the US House of Representatives in Washington, DC. He was an associate in the employment law practice of Lafayette & Kumagai LLP, as well as a law clerk for Tellme Networks Inc. (a subsidiary of Microsoft Corp.), prior to founding the Law Offices of John T. Hendricks.

Recent representations include advising local businesses about San Francisco's unique employment laws, advocating for design professionals and developers in construction and real estate disputes, and litigating as part of a nationwide *qui tam* action alleging violations of the False Claims Act by the pharmaceutical industry.

Mr. Hendricks participates in numerous professional and civic organizations, and has held leadership roles for several, notably serving in the House of Delegates of the American Bar Association, as president of the National LGBT Bar Foundation and as a director of Bay Area Lawyers for Individual Freedom (BALIF).

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LAW OFFICES OF  
JOHN L. FITZGERALD



### Areas of Litigation Specialty

- commercial disputes
- investor fraud
- breach of fiduciary duty
- business dissolution
- antitrust
- trade secrets
- real estate
- professional malpractice
- employment

### Law Offices of John L. Fitzgerald

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John Fitzgerald founded the Law Offices of John L. Fitzgerald to provide the most effective and efficient business litigation services for small and medium-size clients. In three decades of experience, Fitzgerald has earned a reputation for identifying opportunities, consequences and alternatives that may not be immediately apparent.

Recognizing that civil litigation is often contentious, Fitzgerald stands out with his calm, even-keeled demeanor and ability to offer a fresh, candid perspective. He guides clients through a thorough process to determine the best course of action for their businesses — and themselves. Fitzgerald provides both tenacious representation and skillful negotiation, always working to find the smartest resolution and most sensible outcome.

A Bay Area native, Fitzgerald honed his skills at such firms as Cotchett, Illston & Pitre and Pinnacle Law Group, LLP; and he has served as general counsel and chairman of the board of the St. Francis Yacht Club in San Francisco. He has extensive trial and appellate experience, representing both plaintiffs and defendants in federal and state courts. He holds a JD from Santa Clara University School of Law and a BA from the University of Notre Dame.

The Law Offices of John L. Fitzgerald combine an unparalleled breadth of experience in business litigation with a deep commitment to the most effective, efficient client counsel and representation.

*Martindale-Hubbell AV Preeminent<sup>®</sup> rated lawyer*