



SANTA  
BARBARA  
FIDUCIARY

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## Who We Are

Lindsay Leonard Dorner founded Santa Barbara Fiduciary in 2009 based on the journey and challenges she faced here in Santa Barbara while taking care of her grandmother during her final life transition. After earning her degree in Biological Sciences from U.C. Santa Barbara, Lindsay worked in the research and development of pharmaceuticals and as a financial analyst. Lindsay has spent much of her life supporting others along their paths. Being a private professional fiduciary is her calling.

## What We Do

A private professional fiduciary is an individual who can serve as a legal agent in making financial, health care, and quality of life decisions to protect client wishes and put their best interests first. At Santa Barbara Fiduciary, we help clients navigate life transitions by providing objective, personalized services and unlimited choices. We are flexible and capable of acting quickly on our clients' behalf. We serve as trustworthy advocates for the elderly and individuals in need.

## What People Say

Lindsay Leonard is intelligent, compassionate, and has the highest level of integrity. She has excellent financial management ability as well as a caring and personalized approach to serving her clients. She is responsive, conscientious, and well-organized. She is an exceptional private fiduciary qualified to serve as conservator for either the person or estate. She also handles financial management for those who just need additional help with such matters as they get older. I have been very impressed with her.

—Susan McCollum, Attorney; Hollister & Brace

Lindsay Leonard is a caring, thorough and hard working team member. She has been a great asset to our probate and estate management and one of our most valued “go to” resources. I recommend her work unequivocally, if you are in need of her assistance.

—Barbara Liss, Paralegal; Law Office of Christopher C. Jones

## Licenses & Certificates



U.C. Santa Barbara  
B.S. Biological Studies



Certificates in Professional Fiduciary  
Mgt for Trustees & Conservators



CA Licensed Private  
Professional Fiduciary #470



National Certified  
Guardian



THE STATE BAR OF CALIFORNIA  
*Trusts and Estates Section Member*

State Bar of California  
Trusts & Estates Section



Santa Barbara Estate  
Planning Council



Professional Fiduciary  
Association of California



Santa Barbara  
County Bar  
Association

Santa Barbara County  
Bar Association



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