

Clients

In 2012, as our parents entered their late 80s, my two brothers and I and our wives became very concerned about Mom and Dad's ability to manage their financial and personal affairs. We had witnessed potential problems, including missed bill payments, lost checks, missed appointments, susceptibility to scams, and a general decline in our parents' financial acumen and ability to follow through. At the same time, as none of us lived in Santa Barbara, and each of us had a full time career, even though we all visited frequently, we knew that none of us could devote the time necessary to keep Mom and Dad "on track."

Mom and Dad had a tax accountant and an estate planning attorney, but no one available to help them with day-to-day issues. Knowing that Mom and Dad wished to maintain their independence and just needed assistance in executing their own objectives, we were very fortunate to be referred to Lindsay Leonard, and her company, Santa Barbara Fiduciary. At our request, Lindsay and her staff agreed to work directly with our parents to handle bookkeeping, bill paying, record maintenance, and scheduling. They were invaluable in assisting Mom and Dad in managing their affairs, protecting them from fraud, and helping them maintain their medical appointment and social schedules. They became vital intermediaries between Mom and Dad and the retirement community they lived in, and at the same time assisted with timely and important communication among the entire family.

When Mom died in 2014, Santa Barbara Fiduciary's services were critical in allowing Dad to continue to live independently until his death in late 2016. And my brothers and I, as trustees of our parents' estate, have been very grateful to have the benefit of Santa Barbara Fiduciary's management and record-keeping expertise.

The honesty, integrity and discretion that were central to Santa Barbara Fiduciary's service to our parents as they aged meant that events that could otherwise have turned into crises were instead well managed stages in life's normal processes. And of greatest importance is that having Lindsay and her staff's help managing the "business end" in our parents' final years gave each of us a better opportunity to maintain our close and loving family relationship with each of our parents, right up to the ends of their lives.

- Robert Sawyer, Son, Co-Trustee, Beneficiary, & Client - November 2016

My name is Virginia Anders, I live here in Santa Barbara. I want to give a recommendation of Lindsay Dorner. I started using Lindsay probably a year and a half ago. My husband died unexpectedly and I was left with no trust, no will, no idea about how our (money was paid or) bills were paid. In our 30 years of marriage, he handled all of the financial stuff. I didn't know anything and I did not know where to start. My lawyer recommended Lindsay and is probably one of the best recommendations I've ever had in my life. She helped me navigate through all of the probate court proceedings, through all of the changing of names and title and stuff for 5 different vehicles. Selling a house, buying a house, getting all the things in my name. She helped me through the process of retiring in this situation and I'm so incredibly grateful to her and I just don't know where I'd be without her help. I recommend if you're in a situation like that and you need somebody to provide that sort of guidance -not just guidance financially- but care. If you need a hand to hold, I would definitely recommend Lindsay.

-Virginia Anders, Client - 2016

For the past three years I have been managing my mother's Estate. This has been one of the most challenging and emotionally demanding tasks I have ever faced. Lindsay was able to help me clarify what had become a rather tangled situation.

I find Lindsay to have a very quiet, caring and gentle manner, yet at the same time, she is highly efficient and productive. Lindsay is very sensitive, has a lovely sense of humour, and is incredibly professional. I highly recommend her, she has an ability to put one at ease, which I feel is hugely important, given how emotionally charged taking care of a parents' affairs can be.

-Melanie von der Schulenburg, Client

It is with profound affection that I want to thank you again for the devotion toward Barry and I during this extremely difficult time. We were both so grateful for the care and love that you demonstrated during these past few months...

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-Laurence Pinnolis Client, Santa Barbara

My name is Kevin Gacomo. I live on the East Coast. My cousin passed away last year in Santa Barbara. The attorney that I hired to handle the estate found Lindsay from Santa Barbara Estate Services to clean out all of the personal effects from his house, which he didn't own.

She removed everything that was in the house the house, recycled everything; was able to get rid of the car. It needed to be done quickly because we were paying rent on the property. All that I can say is that she did a tremendous job. I thought I was going to have to fly out to California to do this myself but these guys took care of it. She was tremendous. I don't know what else to say. If I ever needed someone else to do something like this again, I would absolutely hire her.

-Kevin Gacomo, Client

We are pleased that we chose Lindsay Leonard... She assisted us through all phases of amending our trusts... interfacing with attorneys and medical professionals, safeguarding our documents... and concise medical profiles... She acted as liaison with banks and businesses...She interfaced seamlessly with all concerned. What is really comforting is knowing that she is absolutely dedicated to being there for us in the case of an emergency. More impressive still has been Lindsay's positive, caring, supportive attitude as she executed every task in the most competent yet efficient manner...Lindsay has been our healthcare advocate, life-style facilitator, and our "safe place to fall."

- Client, Santa Barbara

I was really thrilled with the work that Lindsay Leonard did. She was totally professional, totally punctual, had all the people organized to take care of everything I had asked for. Since I was arranging this from the opposite coast, it was especially important that I had someone who could take initiative and just get it done really well. I recommend her to you with enthusiasm.

-Douglas Bernon, Executor & Client

When my sister was going through a very difficult time [having lost her daughter and her husband in less than a year and a half] she turned to Lindsay Leonard of Santa Barbara Estate Services for assistance in organizing her financial affairs. My sister had been Executive Director of a major Santa Barbara County non profit organization for over twenty years and in that capacity managed their income and expenses and prepared all their necessary financial reports. But her personal situation had deteriorated to the point that she lost her home and often was paying hundreds of dollars in late fees each month.

Lindsay was able to quickly assess the problems and to establish a budget plan that my sister was comfortable following. She prepared easy to understand financial documents and helped my sister feel like she was in control again.

I came to know Lindsay during the past year as my sister's physical condition deteriorated. I found her spreadsheets and reports enormously helpful but even more importantly, I think, it was Lindsay's warmth and compassion that meant the most to us. We enjoyed her visits immensely and looked forward to any excuse to see or to talk with her. Although my sister passed away July 1, Lindsay has graciously taken my calls and has provided me with information and advice whenever I've asked. The services she has provided us far exceed the amounts she has billed us for and I will forever hold her as the standard by which all others should be measured.

-Virginia M. Kazor, Client/Sister to Client

It is with profound affection that I want to thank you again for the devotion toward Barry and I during this extremely difficult time. We were both so grateful for the care and love that you demonstrated during these past few months. I hope we will stay in touch and wish you the best. With love, Laurence

-Laurence Pinnolis, Client

Professional Colleagues

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 is a compassionate and diligent estate representative. She has given individualized attention to each client we've introduced to her and provided warm, considerate and respectful assistance to the most vulnerable of people at perhaps the most frightening times of their lives. We trust her completely and recommend her without reservation.

-Barbara Liss, Paralegal
Law Office of Christopher C. Jones

Lindsay provided invaluable help on a probate on which I served as the Executor. I was faced with a residence filled with 50 years of files, furniture and personal belongings, computers and electrical equipment, ham radios and towers, and a garage that had been converted into a commercial chemical lab. In a little over a month, Lindsay had coordinated two visits by the "hazmat" team, an estate sale, and a stellar cleanup crew to get the property ready for sale. We received multiple offers and closed escrow in three weeks. I could not have done it without Lindsay and I cannot recommend her more highly.

-James F. Cote, Esq.
Law Offices of James F. Cote

Lindsay is an exceptional individual. The caring, dedication and support that she provides to her clients is remarkable. I have worked with Lindsay several times and recommend her highly to my clients that need her services. Lindsay is smart and genuine. I always look forward to working with her.

-Cristi Michelon, Attorney
Law Office of Cristi Michelon

I have hired Lindsay Leonard of Santa Barbara Estate Services on two separate occasions to handle two separate matters for an elderly client, first to find an assisted care facility as my client exhibited signs of dementia, which eventually involved actually moving my client, dealing with her possessions, and making certain that my client received the appropriate care at a price should could afford; and second to handle matters following my client's death. Ms. Leonard handled all of these matters with care, integrity, and compassion, attending to things with the same enthusiasm and attention to detail that she would have provided her own loved-one. She was diligent, careful, and thorough in every aspect. My client and I both were so grateful for Ms. Leonard's presence and work. Had we needed fiduciary services, we would not have hesitated for an instant to engage her for those services as well. I highly recommend Ms. Leonard for all matters dealing with senior issues, from finding and overseeing in-home care, locating appropriate assisted living care, handling the relocation, dealing with the client's possessions, and attending to whatever related matters arise.

-Matthew Berger, Attorney

Lindsay Leonard was an important part of the research team at Dunvegan Associates, Inc. She assisted in various aspects of the research process that we employ on a daily basis. Some of the more important functions she performed were analyzing

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financial statements, reviewing economic reports, interpreting government policy, complex financial modeling, and valuation analysis.

Her work ethic and professionalism were revealed time and again as challenging and time-sensitive projects were assigned. She used her resources efficiently and was committed to completing her tasks, even if it required staying late or arriving early. She was effective in communicating with both her colleagues at the firm and with contacts outside the firm. Lindsay delighted everyone with whom she worked. Attention to detail, communication, and professionalism were the source of Lindsay's success at this firm. Her skills and determination should allow her to achieve any objective she chooses. We think very highly of Lindsay and expect her to be valued in any role that she assumes.

-A.C. Moore, Chief Investment Officer
Dunvegan Associates

Lindsay Leonard joined the West Coast Asset Management team as a Junior Research Analyst intern in November 2007 and worked with us through the end of May, 2008. WCAM was founded in 2000 by Lance Helfert and Kinko's founder Paul Orfalea, and provides exclusive equity and alternate asset management to high net worth individuals, institutions and charitable foundations. As of this date, WCAM's assets under management exceed \$500 million.

Lindsay's scientific research background proved valuable to WCAM and her strong desire to learn about business and the investment industry were impressive. She performed intensive investment research and analysis of industries and specific companies utilizing SEC Reports, company conference calls, 3rd party research and internet resources. As a quick learner with an outstanding work ethic.

Lindsay assisted in the construction of complex financial, operational and quantitative valuation models including discounted cash flow, forward earnings, and sum of the parts analysis. During her seven months at our company, Lindsay exhibited an exceptional work ethic, excellent performance, strong personal interaction skills, and the ability to function quickly and efficiently in a fast paced environment.

-Atticus Lowe, Chief Investment Officer
West Coast Asset Management

Contact Information For References Provided Upon Request.