# The Elder Care Resource Team

We are a group of unaffiliated, independent professionals dedicated to educating and assisting the senior and caregiving community concerning the wide ranging and complex issues of aging. The team meets monthly to exchange ideas and information, publishes an informative newsletter, and participates in educational seminars and workshops throughout San Diego. To learn more, please visit our website: www.eldercareresourceteam.com.

## About Our Team Members

**Amy Abrams, MSW / MPH, CMC**
**Geriatric Care Manager, Elder Care Guides**
Amy and her staff are certified professional geriatric care managers, and provide a range of services including assessments, care planning, placement consultations, and in-home care services. If you have concerns about an elder's safety or well-being, call upon a care manager to provide an objective perspective and recommendations. Contact: (619) 450-4300 or aabrams@eldercareguides.com

**Jim Colville, CPA**
**Certified Public Accountant / Tax Specialist**
Jim assists clients in making the best possible informed financial decisions in whatever the client's needs are at that stage in their life. This can involve philanthropic or planned giving integrated with estate planning, including charitable remainder trusts, family trusts, private foundations and other unique planning tools. Of course, these services result in reducing income taxes, one of life's largest expenses. Contact: (858) 682-9668 or jim@jimcolvillecpa.com

**Lauren Derstine, JD**
**Daily Money Manager, Senior Support**
Lauren is a licensed attorney in CA, NY and NJ with a strong civil litigation background. She pays bills, completes personal paperwork, and advocates for clients. Lauren conducts asset determinations, tracks income and spending, reconciles bank accounts, generates reports, does personal banking, monitors for fraud, reviews mail, and organizes documents while communicating key information to authorized third parties. Contact: (619) 303-2558 or llderstine@gmail.com

**Irving Eisenberg, CPA / PFS**
**Financial / Investment Advisor, Wealth Manager Group, LLC**
Irving is the CEO and owner of Wealth Manager Group, an independent Registered Investment Advisor. The company's headquarters are in San Diego, with a satellite office in Irvine. The firm's principal services are portfolio management and financial planning. Their goal is to make their clients' objectives their number one priority. Contact: (619) 574-7526 or ieisenberg@wealthmgr.com

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### Julia Fagin

**Insurance Agent, Konecki Insurance Brokerage**

Julia is an independent, licensed Property Casualty Insurance Agent working at a top independent brokerage in San Diego. She works with over 25 different insurance markets to find the most appropriate coverage for the best price. Not only does Julia “shop” your insurance, she advocates for your needs. Her top priority is protecting her clients’ families, homes, belongings and assets.
Contact: (858) 751-5888 or julia@koneckiins.com

### Joan Tincher, RN, MSN, GNP

**Nurse Case Manager, Health Care Group**

Joan is a Geriatric Nurse Practitioner, and is responsible for assessing all residents before their move into a Health Care Group facility. She determines their needs and the appropriate level of care, and ensures a smooth transition back to residential care for residents after a hospitalization. When the wishes are to remain at home as long as possible, she assists in building a plan of care.
Contact: (760) 484-3150 or jkallin@healthcaregrp.com

### Debra Lobatz, MA, MFT

**Family Therapist**

Debra is a licensed Marriage and Family Therapist. Her experience as a caregiver to a parent with Alzheimer’s disease informed her decision to help individuals and families struggling with caring for loved ones with dementia or chronic illness. Debra has a private practice in Encinitas.
Contact: (760) 634-3188

### Michael Pohl

**Mortgage Broker, Rancho Santa Fe Mortgage**

Contact: (858) 756-1344 or mpohl@rsfmc.com

### Michelle Serafini, CIPS, TRC

**Realtor, Coldwell Banker**

Michelle is a licensed real estate agent with over 25 years experience in marketing and executive sales. She has earned a reputation for success with properties that are held in family and/or bank trust. She works closely with her clients to ensure that the buying and selling of their real estate assets is successful.
Contact: (858) 829-6210 or michelle@locationlocationcoastal.com

### Richard Scott Stewart

**Elder Law Attorney, The Elder Care Law Firm**

Scott is a California Elder Law attorney, whose practice focuses on solving the unique problems confronting our senior population. These problems include: protecting assets, estate planning, planning for incapacity, senior advocacy, and benefits planning and retention. When a family member has a diagnosis likely to result in the need for care assistance, Scott can help a family deal with these difficult problems. Contact: (619) 282-1194 or eldercarelawfirm@gmail.com

### Elizabeth Wagner, RD, CCN

**Dietician/Nutritionist, Functional Nutrition Therapy**

Contact: (619) 437-6600 or elizabeth@functionalnutritiontherapy.com

**To learn more, please visit our website:**
**www.eldercareresourceteam.com**