Dan Sandoval
925-689-4927
dansandoval@astound.net

Dan has been providing financial security to people around the bay area since 1978. He believes that putting his clients first and maintaining the utmost level of professionalism on their behalf is a must that has never steered him wrong. Dan brings the highest degree of exceptional experience to his clients by listening to their needs and working diligently with them to implement a plan that meets all their concerns. Dan's specialty lies in business and personal life insurance, disability income replacement, and annuities. Dan's clients would describe him as honest, helpful and hard working.

Dan has been married for 40 years. He has two grown daughters, a son-in-law, and four grandchildren. Each spring you'll find Dan coaching high school track. He's been a coach for twelve years and loves working with athletes.

David Breslow
510-886-1318
dbreslow@jps.net

Dave has been serving his clients' financial needs for nearly 30 years. With his rich background in insurance and financial planning, Dave guides his clients to their financial goals. Dave's client base ranges from individuals to smaller corporations. He skillfully assists them in comprehensive wealth management.

Dave is married and has two adult children. In his spare time Dave enjoys playing and coaching basketball.

Robert Feeney
707-863-8898
premierlife@comcast.net

Robert is a General Agent through Premier Life Insurance Services and has had the opportunity to represent top rated insurance plans and investment opportunities for his clients since 1982. Robert has been offering life, health, long term care, estate planning and investments for over 20 years.

He graduated from Sonoma State University majoring in business and foreign languages. He is fluent in Spanish and can speak French and German. He has been trained in Arabic thru his military service with US Air Force language services. Outside of his work Robert is married to his wife and has children. His interests include swimming, the gym, camping, traveling, reading, biking, gardening, baseball and music.

Donald Kline
415-381-1422
donklinecltc@earthlink.net

Don Kline, CLTC, is an independent insurance professional with 34 years as a trusted advisor to families, individuals, business owners, executives, entrepreneurs and the self-employed. He is a repeat top national producer, authority and expert witness in the areas of life and disability insurance and holds a CLTC Certified Specialist designation in Long-Term Care Insurance. Don partners with estate planning attorneys, CPA's, CFP's, trust officers at banks and private fiduciaries, designing competitive and tax-efficient insurance plans.

Don takes a personal approach to every aspect of his business – from assessing client needs to shopping the marketplace. Corporate officers, small business owners, and the affluent attest to Don's skill set as invaluable. As an impassioned ally, Don has been serving the LGBT Community for his entire career. Formerly a K-5 teacher and university instructor for 16 years, he is committed to "serving, not selling," thereby sharing his expertise and empowering his clients.

Gary Campbell
925-634-8732
gccampbell4@comcast.net

Gary has been a licensed insurance agent for 49 years. He works with clients in providing Life and Disability insurance as well as Long Term Care and Annuities with different top rated insurance companies.

Gary has lived in Discovery Bay since 1985, and in his spare time enjoys playing golf.

Tom Beardsley
209-334-1887
tbeard564@sbcglobal.net

Tom has been representing clients for 20 years as a licensed Life Insurance agent as well as a Registered Rep in the securities industry. He is currently licensed in 5 states to sell insurance products. Working in the financial service industry has allowed him to work for each of his clients as individuals to meet there needs and determine what is going to be the best product or service to reach their goals.

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Jeff Wong
707-634-7253
jeffrey@penguinca.com

As owner of JW Insurance Agency, Jeffrey Wong is involved in all aspects of the agency operations - including sales, marketing, and coaching and development. Jeffrey started working in the insurance industry at age 21 as a Farmers Insurance agent, and after 10 years, he transitioned into an independent brokerage, now JW Insurance Agency. His agency has over 35 companies to help serve his clients with life, auto, home, and business insurance. Jeffrey holds a Bachelor of Science in Business Administration, and a Master of Arts in Leadership. He serves the Benicia and Vallejo communities as a tennis player, mentor, and coach. He is also the founder of the non-profit called “Honors Tennis,” which is a program that seeks to decrease drop-out rates by encompassing tennis, fitness, and leadership skills.

Robert Fredrickson
925-828-0375
bob@fredricksonfinancial.com

Bob Fredrickson specializes in Long Term Care, Life, Disability Insurance and Annuities. He received his Life Underwriter Training Council Fellow (LUTCF) in 1995 and his Certification in Long Term Care designation (CLTC) in 2001.

Mr. Fredrickson has over 30 years of experience in the insurance and financial industry as an agent and registered representative. He works with individuals, families and businesses to provide quality products for their insurance and retirement needs. He has conducted Long Term Care seminars for financial planning groups and provided LTC mentoring for agents.

Mr. Fredrickson holds a bachelor’s degree from Occidental College and a master’s degree in Education from California State University, Fullerton.

Richard Pogue
503-419-5813
rickp@heffgroup.com

Rick has been in the financial services industry for over 14 years. As a financial professional, Rick specializes in advanced insurance planning techniques to help his clients achieve their financial security. He works with individuals, business owners and their employees to set goals, provide strategies and implement a plan to reach their ultimate goals.

Rick received his Bachelor of Arts degree from California State University Monterey Bay. He obtained his Chartered Life Underwriter (CLU®), and Chartered Financial Consultant (ChFC®) designations from The American College. In addition, he served four years in the US Air Force.

Rick is active in the community; he volunteers his time on the President’s Council of the Portland Business Alliance. He is a professional member of the Estate Planning Council of Portland. Some of his passions are classic cars, playing tennis, biking with his family and spending time with their Bassett Hound, Lilly.

David Grant
408-996-3827
dnlgrant@aol.com

Dave has been providing insurance expertise to his client base for the past 34 years and to his securities clients for the past 13 years. He has approximately 1,000 clients that he provides insurance and securities services for. He is licensed in securities and financial planning as well as life insurance, annuities, estate planning, financial retirement planning and wealth accumulation. Dave grew up in Canada and Michigan and after graduating from the University of Michigan, migrated to California as soon as he learned to read a thermometer. He went back to school to pursue an advanced degree in Archaeology recently and spends a great deal of his spare time pursuing that interest.

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