Santa Barbara Council of Charitable Gift Planners

Why do I need licensed fiduciary, trust officer and wealth advisor? And what are they anyway?


Dianne Duva


Jackie Quinn


Del Rudeen

Tuesday, May 10, 2022

11:30 am – noon (networking)
12 – 1 pm (seminar)
Harry's Plaza Café, 3313 State Street, Santa Barbara, CA 93105

$45 for non-members, $35 for members
Click Here for Tickets

Join our panel of presenters to learn the differences between a licensed professional fiduciary, bank trust officer, and wealth advisor. Our esteemed panel will share information about why individuals, non-profits, and financial organizations need to know what these professions do to help their donors and clients navigate planned gifts and matured estates.

Key Takeaways: Differences between three types of financial professionals and how they can be of assistance for creating and realizing planned gifts.

Dianne G. Duva, CFP, Founding Partner from Arlington Financial Services
Dianne Gayoski Duva, CFP® is a founding partner of the wealth management firm of Arlington Financial Advisors in Santa Barbara. She advises high net worth families, business owners and women in transition. Dianne helps clients understand and manage their net worth and solve

complex financial problems by offering advice in an array of areas including retirement planning, insurance planning, and estate and tax planning in addition to investment management.

A graduate of The George Washington University, located in Washington, DC, Dianne holds the Certified Financial Planner® designation.

Additionally Dianne co-hosts a weekly radio show called Money Talk on AM 1290 KZSB Newspress radio. The show covers just about everything that affects wealth, financial well-being and the global investment markets.

Dianne has been very involved in the Santa Barbara community. Currently, she serves as a member of the Board of Apples to Zucchini Cooking School and the Music Academy of the West. Additionally, she serves on the Endowment Committee of The Women's Fund of Santa Barbara and the Strategic Advisory Committee for Women's Economic Ventures. In addition, Dianne was selected as a Katherine Harvey Fellow, an 18 month leadership program, in 2011. She was the President of the Junior League of Santa Barbara in 2007 and has successfully completed the Leadership Santa Barbara County program in 2005. She lives in Santa Barbara with her husband Rob and their two children.

Jacquelyn Quinn, PhD, CLPF, NCG from Quinn Fiduciary Services
Jackie Quinn received her BA in Business Administration and Psychology from Antioch University, prior to receiving her Doctorate in Psychology from Saybrook Graduate School and Research Institute. Jackie has worked in the estate planning and administration fields for over 30 years. Before founding Quinn Fiduciary Services, Jackie served for a number of years as a co-fiduciary with the late Suzanne McNeely of Senior Planning Services.

She is a California Licensed Professional Fiduciary and acts as a Conservator, Trustee, Administrator, Executor and Representative Payee. She has served on the Elder and Dependent Adult Abuse Prevention Council of Santa Barbara County, is a member of the Professional Fiduciary Association of California (PFAC), is past President of the Santa Barbara Estate Planning Council and is a former Board member of the Santa Barbara Paralegal Association and was a member of the former Santa Barbara County Financial Abuse Specialist Team (FAST). She is also a board member of the Planned Giving Council of the Museum of Natural History.

Jackie is a former instructor at California State University Fullerton, in the University Extended Education program. She frequently speaks on topics related to the care and safety of elders, including elder abuse, legal capacity and end of life decisions. She has also presented for the Central Coast Alzheimer's Association.

Del Rudeen, CTFA, VP and Trust Officer, from Farmers & Merchants Trust
Del Rudeen joined Farmers and Merchants Trust Company in 2017 as a Vice President and Trust Officer. Del has 32 years of experience in the trust and wealth management business. During this time, he has administered revocable and irrevocable trusts, charitable remainder trusts, taxable and nontaxable estates. He holds a Certified Trust Financial Advisor (CTFA) designation from the American Bankers Association.

Del has served various charitable and industry organizations. He is a member and past board president of the Santa Barbara Estate Planning Council, is past president of the board for the Foundation for Girsh Park and a past board member of Direct Relief International and the Rotary Club of Montecito.

Del has a BA from North Park University and a Master of Business Administration from the Thunderbird School of Global Management.

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Charitable Gift Planners of Santa Barbara, formerly known as the Planned Giving Round Table of Santa Barbara, is a professional association for non-profit development officers and allied professionals in financial, legal, accounting, and consulting services. The chapter's purpose is to educate members about charitable gift planning, advance the mission of non-profit organizations, and better serve the philanthropic goals of donors and clients. The local council is affiliated with and a Chapter of the National Association of Charitable Gift Planners.

Educational and networking meetings are held five times a year and are open to members and non-members. For more information visit www.sbgiftplanners.org, email Board President Del Rudeen at (805) 324-5410 or Del.Rudeen@fmtrust.com