

Welcome to the Spring edition of our *Inside Swenson* newsletter. We are pleased to provide you with the latest news and update you on some of the exciting happenings at Swenson.

## INTEGRA AAANZ 2026 WELCOME TO SAN DIEGO



**SWENSON ADVISORS will be the proud host of the Integra AAANZ 2026 Conference** at the Omni San Diego Hotel May 14-16, 2026. We have an exciting Agenda and Activities planned for our attendees and their companions and guests, **who will be welcomed by Stephen Radachi, AAANZ President, and Steve Austin, Managing Partner of Swenson Advisors.**

Joining us as sponsors will be our colleagues:

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Our program features a distinguished lineup of speakers offering valuable insights across a range of topics. Highlights include:

- **Featured Speaker:** Richard Bailey will present *The State of San Diego County and What Lies Ahead*, along with reflections on his experience climbing Mount Everest
- **Military & Defense Industry in San Diego:** John Tishler, Senior Partner, Sheppard Mullin
- **R&D Tax Credit and Employee Retention Credit Updates:** David Mayer and Greg Elias, Partners, Think Advisers
- **Going Beyond the Numbers:** Andrew Aguirre, VP of Sales, ADP
- **Boring IT. Bigger Wins:** Robert Christian, SymTec
- **Innovation in Southern California:** Jay Goth, Executive Director, InSoCal CONNECT and James Zanicwicz, CEO, CONNECT

**A highlight on the concluding afternoon of the Conference will be a Panel Discussion Moderated by Steve Austin on Accounting, Auditing and Tax Update.** Panelists will include Yulia Shchurovska and Grace Brentlinger of Swenson Advisors, Glen Aldridge and Sam Odum of CoSurve CPAs, and Jim Rose of Abeles and Hoffman.

**Additional Integra-focused sessions will be addressed by Stephen Radachi, AAANZ President, Bill Sims, Grant Gilmour, and Don DeGrazia.**

**Swenson Advisors will sponsor a gala dinner at the University Club Atop Symphony Towers,** including speakers and music by **World Famous Zoro the Drummer.**

Another exciting evening dinner event will take place in **Old Town at Casa Guadalajara,** where guests will enjoy authentic Mexican cuisine, Mariachi entertainment and a festive atmosphere.



*University Club Atop Symphony Towers*



*Casa Guadalajara*

Attendees and their companions will have opportunities to tour the **USS Midway** and visit the **San Diego Zoo** and the **Navy SEAL Museum**.



*USS Midway*



*San Diego Zoo*



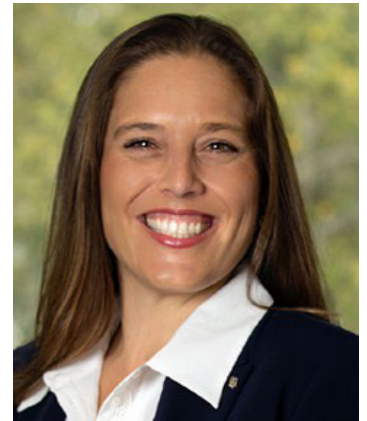
*Navy SEAL Museum*

**We are looking forward to welcoming you to our wonderful City of San Diego and joining us for this very special event.**

# DR. JULIE HAYDEN REPRESENTS ECTLC AND RHOMBUS AT THE WHITE HOUSE

Swenson Advisors is proud to support Dr. Julie Hayden and the impactful work she continues to lead through the organizations she has founded.

Dr. Hayden is a licensed psychologist, CEO of East County Transitional Living Center in El Cajon, CA COO of Rhombus, Clinical Director of Rhombus Counseling, La Mesa Counseling, New Vision Counseling Center and Genesis Recovery. She is also the Co-Chair of the San Diego MFT Consortium and the former Co-Chair of the Treatment and Intervention Committee of the San Diego Domestic Violence Council. She has seventeen years clinical experience which includes working with chronic mental illness, substance and sexual addictions, adolescents, families, PTSD, depression, anxiety, domestic violence, and more. She has taught at numerous universities, was previously the Dean of a local University and is currently co-founder and Chief Academic Officer of Rhombus University.



Dr. Hayden recently represented the East County Transitional Living Center (ECTLC) at the White House’s *Best Practices for Addiction Treatment Within Homelessness Summit*, held April 13–14. This national conference brought together leading experts to identify more effective approaches to addressing addiction, mental illness, and homelessness. The summit was hosted by the Office of National Drug Control Policy, the U.S. Department of Health and Human Services’ Substance Abuse and Mental Health Services Administration, and the U.S. Department of Housing and Urban Development.

During the “Best Practices – San Diego & Greenville” session, Dr. Hayden presented key principles from the Rhombus Model, along with insights from ECTLC’s work serving individuals and families facing homelessness, addiction, and instability. Her presentation, “*From Instability to Independence: Designing Systems That Actually Work,*”

emphasized a critical truth: lasting change requires more than isolated services—it requires an integrated system that supports individuals from crisis to stability and ultimately to independence.

Dr. Hayden outlined a practical three-part framework: **Protect** → **Prepare** → **Propel**.

- **Protect** focuses on stabilizing individuals both mentally and physically.
- **Prepare** centers on building skills, structure, and readiness for change.
- **Propel** supports the transition to long-term independence.

Her presentation also highlighted foundational principles essential to sustainable recovery: the importance of culture in shaping outcomes, the value of adequate treatment time, the necessity of individualized care, and the critical roles of faith, community, and education in breaking cycles of instability.



**Swenson Advisors extends its sincere gratitude to Dr. Julie Hayden, Dr. Ray Hayden, and their dedicated teams for their unwavering commitment and the meaningful impact they continue to make in the community.**



# MEET JENNIFER BROTTEN



*Office Manager/ Tax Administrative Manager*

**Jennifer Brokken** joined Swenson Advisors in 2001 and has more than 30 years of experience in managing and organizing service, education, and accounting industries.

## **PROFESSIONAL EXPERIENCE:**

- **2001–Present** - Swenson Advisors, LLP - Receptionist, Temecula Connect Coordinator, Office Manager, Tax Administrative Manager
- **1992–2001** - University of Phoenix - Communications Specialist, Faculty Services Assistant, Faculty Services Administrator, Academic Counselor, Learning Center Administrator, Learning Center Manager

## **EDUCATION**

- **University of Phoenix**, Master of Arts in Organizational Management
- **University of Phoenix**, Certificate in Human Resource Management
- **University of Phoenix**, Bachelor of Arts in Management
- **Arapahoe Community College**, Associate of Applied Science in Management

Jennifer is also proficient in American Sign Language (ASL). Both she and her husband Michael are devoted dog lovers.



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