

Jodi Pais Montgomery

Licensed Professional Fiduciary

Pais Montgomery Fiduciary

1443 E. Washington Blvd. #644

Pasadena, CA 91104

tel 626.398-2090

fax 775.659.3150

jodi@paismontgomery.com

www.paismontgomery.com

Services Performed: Trust and Estate Administration; Conservatorships of Person and Estate.

Fiduciary Practice Profile: Jodi has been a California-Licensed Professional Fiduciary since April 25, 2011. She is one of the founders of Pais Montgomery Fiduciary, a Pasadena-based fiduciary practice dedicated to the needs of their trust and conservatorship clients—with a strong interest in protecting their clients against all potential incidences of elder abuse. Jodi has substantial experience in estate and trust administration, and conservatorships of both the estate and person.

Licenses and Certifications: *Professional Fiduciaries Bureau*, State of California Department of Consumer Affairs, License No. PF 535; *National Certified Guardian*, Center for Guardian Certification.

Professional Memberships: Professional Fiduciary Association of California, General Member, Southern Region; Estate Planning Council of San Gabriel Valley.

Education: B.A., Social Welfare, University of California at Berkeley, June, 1982.

Experience Related to Social Work and Estate Administration: Counselor with the AIDS Center Pasadena; 1992-2005. Service Volunteer, Special Olympics, 1987-1992.

Prior Occupational History: Advertising Sales Manager, *Documentary* magazine and website for the International Documentary Association, Circulation Manager, South Coast Community Newspapers, Sales Department of The Hollywood Reporter.

Proven Skills Brought to Professional Fiduciary Practice:

- Dedicated guardian of the personal and financial needs of clients with diminished capacities, including both the elderly and special needs adults.
- Thorough, expansive and nurturing manager of client interests, with a devotion to preserving their personal autonomy and protecting them from all forms of elder abuse.
- Well-organized professional with well-developed skills in a wide range of computer applications including Microsoft Excel and Filemaker Pro.
- Well-developed oral and written communication skills, honed by years as a marketing and distribution manager.