

## Jodi Pais Montgomery

*Licensed Professional Fiduciary*

### **Pais Montgomery Fiduciary**

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**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 two principals 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; Fiduciary Roundtable of the 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.

### **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.