



Donna Becker

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Donna Becker has spent nearly two decades specializing in Advanced Wealth Transfer for the highly affluent. As a consultative insurance specialist, she works closely with clients' attorneys, CPAs, financial advisors and trust officers to create customized wealth transfer solutions. She has worked with some of our country's most affluent families, professionals and business owners in advising them on their personal and business planning needs.

Donna holds a degree in History from University of California, Berkeley, and her MBA from Sonoma State University, where she also served as an adjunct professor. In addition, she is a Certified Financial Planner®, FINRA registered, and insurance licensed in multiple states.

EDUCATION

- University of California, Berkeley, CA
- Sonoma State University, Rohnert Park, CA