Calvary Professional Partners

Connecting Professional Resources to the Calvary Community

The mouth of the righteous utters wisdom, and his tongue speaks justice.
The Law of his God is in his heart, his steps do not slip. Psalms 37:30-31

DISCLAIMER

"Calvary Professional Partners" is a resource from Calvary's Business and Financial Ministries. Our goal is to assist in joining Calvary people with qualified and proven professionals who are recognized as being reputable and effective in his/her practice. Calvary Church is not a representative or agent of anyone in the Calvary Professional Partners listing. This relationship does not constitute an official relationship between the church and the listed professionals. Any Calvary member and/or others who use this resource do so solely by choice.

Calvary Professional Partners
Resource Guide

Attorneys/Wills & Living Trusts

Disclaimer – Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.

Contact	Service(s)
David A. Brown, J.D. Brown and Streza LLP 8105 Irvine Center Drive, Suite 700 Irvine, CA 92618 Phone: (949)453-2900 http://www.brownandstreza.com	Complex Income Tax Planning, Estate Planning, Charitable Gift Planning, Business Operation Planning, and Business Succession Planning
Kevin Fehrmann, Attorney Copenbarger & Copenbarger, LLP 18200 Von Karman Ave. Suite 200 Irvine, CA 92612 Phone. (800) 244-8814 kevin@copenbarger.com	Wills, Trusts and Estate Planning, Conservatorship, Probate, Trust Administration, Tax Planning and Business Formations
Jeffrey R. Hartmann - Attorney at Law 501 N. El Camino Real Suite 200 San Clemente, CA 92672 Phone: (949) 429-2578	Probate, Elder Law, Adoptions, Business Law, Estate Planning, Social Security, Wills and Trusts, Corporations, Limited Liability Companies, LLCs, Guardianships, Conservator-ships, Medi-Cal Plan-ning, Trust Administration, Real Estate Transactions
Jerry D. Mackey Schmiesing Blied Stoddart & Mackey, LLP 2260 North State College Blvd Fullerton, CA 92831 Phone: 714-671-1552 http://www.sbsmlaw.com	Estate Planning, Tax Planning, Charitable and Deferred Giving, and Non-Profit Organizations
Dennis L. Watson Attorney at Law Phone: (714) 879-9805 Fax: (714) 879-9806 lawtrams@aol.com Cell: (714) 936-3398 http://lawtrams.com	Wills, Trusts, Probate, Conservatorships, and Business Law

Michael J. Wittick, Attorney Michael J Wittick, a Prof. Law Corp. 7700 Irvine Center Drive Suite 800 Irvine, CA 92618-3047 Phone: (949)753-2829 Email: mwittick@witticklaw.com	Values Based Planning, Estate and Trust Administration, Estate and Trust Litigation, Planning for affluent families, Business Entity and Succession Planning, and Asset Protection

Attorneys/Corporate Law

Disclaimer – Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.

Contact	Service(s)
Neil Pedersen Pedersen Law & Dispute Resolution Corporation 17910 Skypark Circle, Suite 105 Irvine, California 92614 Phone: 949-260-1181 Fax: 949-260-1185 npedersen@pedersenlaw.com www.pedersenlaw.com	Insurance Coverage, Bad Faith Litigation, Wrongful Termination and Discrimination Litigation, Business Litigation, Serious Personal Injury and General Counsel Services

Financial Planners

Disclaimer – Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.

Contact	Service(s)
Charles J. McLucas, Jr., CPA/PFS Charitable Trust Administrators, Inc. 17501 East 17th St., Ste. 100 Tustin, CA 92780 (714) 508-9100 http://www.ctai-ca.com/	Financial Investment and Retirement Planning
William C. O`Connor, CFP®, EA, ATA Applied Financial Planning, Inc. 23101 Moulton Pkwy, Suite 110 Laguna Hills, CA 92653 Phone: 949-380-1210 www.appliedfinancialplanning.com	Financial Investment and Retirement Planning
Neil Paur, CFP® Ronald Blue & Co. 1551 N. Tustin Ave., Suite 1000 Santa Ana CA 92705 Office: 714-972-5904 Fax: 714-543-1722	Financial Investment and Retirement Planning

neil.paur@ronblue.com	
Arlin L. Penner, CIMA, ChFC, CLU, CAP Citi Smith Barney Consulting Group Sr. Inv. Mgmt. Consultant 500 Pointe Dr., Bldg. 10, Ste. 400 Brea, CA 92821 Phone: 714.674.4122 http://www.fa.smithbarney.com/arlin_penner/	Financial Investment and Retirement Planning
James W. Regitz, Jr., ChFC Newport Advisory, LLC 4695 MacArthur Ct., Ste. 480 Newport Beach, CA 92660 Phone: 949-622-9000 http://www.newportadvisory.com/	Financial Investment and Retirement Planning

Notary

Disclaimer – Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.

Contact	Service(s)
Marlene Eckert 3518 E. Copper Kettle Way Orange CA 92867-2060 Phone: 714-974-5884 Cell: 714-458-4694 Email: meckert1@socal.rr.com	Notarizes Acknowledgements, Jurats, Certified copy of Power of Attorney, Oaths and Affirmations. Pro bono services for personal documents of Calvary Church members.

Additional Resources

Disclaimer – Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.

Contact	Service(s)
Foundation for Christian Stewardship 19742 MacArthur Blvd., Suite 230 Irvine, CA 92612 Phone: 949.263.0820 http://www.fcstewardship.com/default.asp	Offers expert counsel and innovative, flexible giving solutions to help individuals, families, churches, ministries, and professional advisors make balanced godly giving decisions.
Kingdom Advisors 5605 Glenridge Dr., Suite 550 Atlanta, GA 30342 Phone: Main: 404-497-7680 http://www.kingdomadvisors.org/map.asp	Primary mission is helping financial advisors integrate spiritual principles in their counsel to clients to further the Kingdom.

Credential Definitions

CFP Certified Financial Planner
The hallmark planning credential. Ensures that an advisor has taken planning-based classes and sat for a fairly rigorous two-day exam which has a 54% pass rate.

PFS Personal Financial Specialist
An add-on credential for CPAs who are also doing financial planning; it confers a working knowledge of the planning process.

CFA Chartered Financial Analyst
This hard-to-obtain designation takes at least 3 years and requires expertise in 10 areas of portfolio management and investment selections. Note: It does not require planning expertise.

CLU Chartered Life Underwriter
A certification sought by those who specialize in selling life insurance.

ChFC Chartered Financial Consultant
Generally sought by those with insurance backgrounds; requires a working knowledge of financial planning. CFP certificate is a prerequisite.

CPA Certified Public Accountant
A very rigorous 2 1/2 day exam. Designates technical accounting and tax competency, but not planning.

MSFP Masters in Financial Planning
A two-year masters program that requires academic prowess in planning, and investments as well as taxation.

CIMA Certified Investment Management Analyst
Top investment consulting designation taken at prestigious Wharton School of Business at the University of Pennsylvania

RIA Registered Investment Advisory
A firm registered with the SEC or State of Georgia to manage investments and /or change planning fees for services rendered.