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. Psalm 37:30-37

<u>DISCLAIMER</u>
"Calvary Professional Partners" is a resource from the Calvary Church Business and Financial ministry. Our goal is to connect the Calvary community with qualified and proven professionals who are reputable and effective in their business. Calvary Church is not a representative or agent of anyone listed in this resource. Inclusion in this list is not an official endorsement by Calvary Church. Use of the professionals listed is voluntary.

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Accounting Services

Contact	Services Provided
Paul Nienow Nienow & Tierney, LLP 17772 E. 17th Street, Suite 250 Tustin, CA 92780 714-836-8300 Ntcpas.com	Currently not taking new tax clients but is available to help with IRS Problems.
Darren Morrow Morrow & Co. 17291 Irvine Blvd, Ste. 357 Tustin, CA 92780 714-385-1212	Tax preparation for Businesses and Business owners. Fractional CFO services.

Attorneys

Contact	Services Provided
Neil Pedersen Pedersen Law & Dispute Resolution Corporation 17910 Skypark Circle, Suite 105 Irvine, California 92614 Phone: 949-260-1181 Fax: 949-260-1185 mail: npedersen@pedersenlaw.com	Insurance Coverage, Bad Faith Litigation, Wrongful Termination and Discrimination Litigation, Business Litigation, Serious Personal Injury and General Counsel Services
Bryan R. Kazarian The Law Offices of Bryan R. Kazarian 4 Hutton Center Drive, Suite 660 Santa Ana, CA 92705 Phone: 714-975-5770 Mobile: 714-336-5303 Fax: 714-380-6325 mail: brk@kazarianatlaw.com	Criminal Defense Attorney for: Driving, Drug, Theft, Fraud, Sexual, Violent, Juvenile, Federal
Angie Navarro Sigala, Attorney at Law Law Offices of John R. Alcorn 2272 Dupont Drive, Suite V Irvine, CA 92612 Phone: 949-553-8529 Fax: 949-553-8550 mail: Angie@JR-Alcorn.com www.JR-ALCORN.COM	United States Immigration & Nationality Law Certified specialist attorney in Immigration & Nationality Law by the State Bar of California Board of Local Specialization

Calvary Professional Partners Resource Guide

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Craig Minegar, Attorney-at-law 139 S. Lime St. Orange, CA 92868 Phone: 714-514-9319 Email: cminegarlaw@gmail.com	Estate Planning – Trusts, Wills, Trust Administration
Kevin Fehrmann, Attorney 16148 Sand Canyon Avenue Irvine, CA 92618 Phone: 949-748-7078 kevin@kmflegal.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 Planning, Trust Administration, Real Estate Transactions
Matt Brown, J.D. Brown and Streza LLP 40 Pacifica - 15th Floor, Irvine, CA 92618 Phone: 949-453-2900 www.brownandstreza.com	Complex Income Tax Planning, Estate Planning, Charitable Gift Planning, Business Operation Planning, and Business Succession Planning
Austin N. Dillon, Attorney at Law Blied, Dillon, & Mackey 2260 N. State College Blvd. Fullerton, CA 92831 (714) 671-1552 adillon@blieddillon.com www.blieddillon.com	Estate Planning: Wills and Trusts, and Trust Administration. Contracts, Probate and related services, Asset Protection
Emanuela "Ella" Gentile, Attorney at Law 1440 N. Harbor Blvd, Suite 801 Fullerton, CA 92835 www.EllaGentile.com 949-438-1192	Estate Planning: Wills and Trusts, and Trust Administration.

Calvary Professional Partners Resource Guide

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Financial Planners

Contact	Services Provided
Neil Paur, CFP® Ronald Blue & Co. 1551 N. Tustin Ave., Suite 1000 Santa Ana CA 92705 Phone: 714-972-5904 Fax: 714-543-1722 Email: neil.paur@ronblue.com www.ronblue.com/bio-nPaur.php	Financial Investment and Retirement Planning
David K. MacLeod, CFA, CFP® Eclectic Associates, Inc. 1440 N. Harbor Blvd., Suite 220 Fullerton, CA 92835 (714) 738-0220 (office) | (657) 207-4020 (direct) Email: dmacleod@eclecticassociates.com www.eclecticassociates.com	Financial Investment and Retirement Planning
Landon Yoshida, CRPC, AIF Apriem Advisors 19200 Von Karman Avenue Suite 1050 Irvine, California 92612 949.253.8888 www.apriem.com/	Financial Investment and Retirement Planning

Notary

Contact	Services Provided
Sandra Wychgel Cell: 714-606-2418 (text preferred) Email: Sandra.wychgel@gmail.com	Notarizes Acknowledgements, Jurats, Certified copy of Power of Attorney, Oaths and Affirmations, Trusts
Deborah Arzaluz Cell: 714-317-7755 Email: yourrealtordeborah@gmail.com	Notary and Realtor

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Insurance

Contact	Services Provided
Aaron Overlien, CRPC® AAMS® CLTC® WMCP® 26501 Rancho Parkway South #102 Lake Forest, CA 92630 Tel. 949 600 8255 Fax. 949 340 8052 aoverlien@ft.newyorklife.com	Licensed to assist with Life Insurance, Investments, Long Term Care, Annuities, & Wealth Management
Tony Jones – Account Representative State Farm – Adam Guss Insurance Agency, Inc. 12711 Newport Ave., Unit C Tustin, CA 92780 Bus: 714-978-4200 Fax: 866-646-5308 Email: tony@adamguss.com Website: www.adamguss.com Insurance License #4273889	Insurance provider for Homeowners, Condo Unit Owners, Renters, Jewelry Riders, Liability Umbrellas, Auto, Life Insurance, and Medicare Supplements.
Michael P Roberts Capstone Partners Financial and Insurance Services, LLC MassMutual – California / Nevada Agency 4695 MacArthur Ct # 1000 Newport Beach, Ca 92660 Direct: 949.225.9334 Cell: 714.272.2408 Fax: 949.833.8351 mikeroberts@financialguide.com CA Insurance License #0678695	Licensed to assist with Life Insurance, Disability Income Protection, Long Term Care Insurance, Annuities, Investments.

Additional Resources

Contact	Services Provided
Kingdom Advisors 5605 Glenridge Dr., Suite 450 Atlanta, GA 30342 Phone: 404-497-7680 www.kingdomadvisors.org	Primary mission is helping financial advisors integrate spiritual principles in their counsel to clients to further the Kingdom.
National Christian Foundation Southern California 19742 MacArthur Blvd., Suite 230 Irvine, CA 92612 Phone: 949-263-0820 Fax: 949-553-8550	Offers expert counsel and innovative, flexible giving solutions to help individuals, families, churches, ministries, and professional advisors make balanced godly giving decisions.

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The Orchard Foundation 8595 Explorer Drive Colorado Springs CO 80920 Phone: 888-689-6300 www.theorchard.org	A fiduciary ministry offering a wide range of gift planning tools to individuals, families, and ministry organizations who desire to make the most of their God given resources to meet personal, family and charitable objectives.

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 to manage investments and /or change planning fees for services rendered.

CSA in I&NL Certified Specialist Attorney in Immigration & Nationality Law
A California attorney who is certified by the State Bar as an Immigration and Nationality Law specialist must have:

- *taken and passed a written examination in Immigration and Nationality Law*
- *demonstrated a high level of experience in Immigration and Nationality Law*
- *fulfilled ongoing education requirements*
- *been favorably evaluated by other attorneys and judge's familiar with her or his work.*