



# 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*

## **DISCLAIMER**

“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.

## Calvary Professional Partners Resource Guide

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### Accounting Services

Contact	Services Provided
Paul Nienow Nienow & Tierney, LLP 17772 E. 17 <sup>th</sup> 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.
Tim Goodfriend Goodfriend & Talbott Accountancy Corp 216 E. Commonwealth Ave Fullerton, CA 92832 714-525-1123 Goodfriendtalbott.com	Tax preparation for Individuals and businesses. Bookkeeping and owner-only payroll 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: <a href="mailto:npedersen@pedersenlaw.com">npedersen@pedersenlaw.com</a>	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 240 Santa Ana, CA 92707 Phone: 949-610-0223 Fax: 714-380-6325 mail: <a href="mailto:brk@kazarianatlaw.com">brk@kazarianatlaw.com</a>	Criminal Defense Attorney for:  Driving, Drug, Theft, Fraud, Sexual, Violent, Juvenile, Federal

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<p>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: <a href="mailto:Angie@JR-Alcorn.com">Angie@JR-Alcorn.com</a> <a href="http://www.JR-ALCORN.COM">www.JR-ALCORN.COM</a></p>	<p>United States Immigration &amp; Nationality Law</p> <p>Certified specialist attorney in Immigration &amp; Nationality Law by the State Bar of California Board of Local Specialization</p>
<p>Craig Minegar, Attorney-at-law 139 S. Lime St. Orange, CA 92868 Phone: 714-514-9319 Email: <a href="mailto:cminegarlaw@gmail.com">cminegarlaw@gmail.com</a></p>	<p>Estate Planning – Trusts, Wills, Trust Administration</p>
<p>Kevin Fehrmann, Attorney 16148 Sand Canyon Avenue Irvine, CA 92618 Phone: 949-748-7078 <a href="mailto:kevin@kmflegal.com">kevin@kmflegal.com</a></p>	<p>Wills, Trusts and Estate Planning, Conservatorship, Probate, Trust Administration, Tax Planning and Business Formations</p>
<p>Jeffrey R. Hartmann - Attorney at Law 501 N. El Camino Real, Suite 200 San Clemente, CA 92672 Phone: 949-429-2578</p>	<p>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</p>
<p>Matt Brown, J.D. Brown and Streza LLP 40 Pacifica - 15th Floor, Irvine, CA 92618 Phone: 949-453-2900 <a href="http://www.brownandstreza.com">www.brownandstreza.com</a></p>	<p>Complex Income Tax Planning, Estate Planning, Charitable Gift Planning, Business Operation Planning, and Business Succession Planning</p>
<p>Austin N. Dillon, Attorney at Law Blied, Dillon, &amp; Mackey 2260 N. State College Blvd. Fullerton, CA 92831 (714) 671-1552 <a href="mailto:adillon@blieddillon.com">adillon@blieddillon.com</a> <a href="http://www.blieddillon.com">www.blieddillon.com</a></p>	<p>Estate Planning: Wills and Trusts, and Trust Administration. Contracts, Probate and related services, Asset Protection</p>

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Emanuela "Ella" Gentile, Attorney at Law 1440 N. Harbor Blvd, Suite 801 Fullerton, CA 92835 <a href="http://www.EllaGentile.com">www.EllaGentile.com</a> 949-438-1192	Estate Planning: Wills and Trusts, and Trust Administration.
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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: <a href="mailto:neil.paur@ronblue.com">neil.paur@ronblue.com</a> <a href="http://www.ronblue.com/bio-nPaur.php">www.ronblue.com/bio-nPaur.php</a>	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: <a href="mailto:dmacleod@eclecticassociates.com">dmacleod@eclecticassociates.com</a> <a href="http://www.eclecticassociates.com">www.eclecticassociates.com</a>	Financial Investment and Retirement Planning
Landon Yoshida, CRPC, AIF Apriem Advisors 19200 Von Karman Avenue Suite 1050 Irvine, California 92612 949.253.8888 <a href="http://www.apriem.com/">www.apriem.com/</a>	Financial Investment and Retirement Planning

### Notary

Contact	Services Provided
Sandra Wychgel Cell: 714-606-2418 (text preferred) Email: <a href="mailto:Sandra.wychgel@gmail.com">Sandra.wychgel@gmail.com</a>	Notarizes Acknowledgements, Jurats, Certified copy of Power of Attorney, Oaths and Affirmations, Trusts
Deborah Arzaluz Cell: 714-317-7755 Email: <a href="mailto:yourrealtordeborah@gmail.com">yourrealtordeborah@gmail.com</a>	Notary and Realtor
Amy Dietz Cell: 714-747-3573 Email: <a href="mailto:amerscj@yahoo.com">amerscj@yahoo.com</a>	Notarizes Acknowledgements, Jurats, Certified copy of Power of Attorney, Oaths and Affirmations, Trusts

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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: <a href="mailto:tony@adamguss.com">tony@adamguss.com</a> Website: <a href="http://www.adamguss.com">www.adamguss.com</a> 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: <b>949.225.9334</b> Cell: 714.272.2408 Fax: 949.833.8351 <a href="mailto:mikeroberts@financialguide.com">mikeroberts@financialguide.com</a> 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 <a href="http://www.kingdomadvisors.org">www.kingdomadvisors.org</a>	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 <a href="http://www.theorchard.org">www.theorchard.org</a>	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.
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## 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 charge 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.*