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Estates Practice Law Business Partner Directory

Contents

| | |
|--|----|
| Asset Transfers & Funding Services | 4 |
| Transfer Assist..... | 4 |
| Auctions | 4 |
| Heritage Auctions..... | 4 |
| Associations | 5 |
| NAEPC National Association of Estate Planners & Councils | 5 |
| Elder Care Services..... | 6 |
| Senior Care Advisors | 6 |
| LifeCare Funding | 6 |
| True Link Financial | 6 |
| Emergency ID , Online Documents, Digital Asset Management..... | 7 |
| SafelyFiled / SafelyMD (Agent: Premier Software)..... | 7 |
| DCS Directive Communication Systems..... | 7 |
| Docubank | 9 |
| Legal Directives | 9 |
| Filing Document Processing Services..... | 9 |
| Parasec..... | 9 |
| Financial Consulting Services | 10 |
| CSSC Consulting Services Support Corp. | 10 |

Compliments of



| | |
|--|----|
| Gryphon Financial Solutions | 10 |
| Innovative Shareholder Strategies, LLC | 11 |
| Lodmell & Lodmell, P.C. | 11 |
| Matsen Voorhees Mintz LLP | 12 |
| Penton Wealth Management | 12 |
| Gifting..... | 13 |
| Make A Wish | 13 |
| NRA | 13 |
| Insurance Products & Services..... | 14 |
| Krause Financial Services | 14 |
| Melville Capital Life Settlements | 14 |
| Active Captive Management..... | 14 |
| ClaimJockey..... | 15 |
| Law Firm Marketing | 15 |
| BAU Mail & Print..... | 15 |
| Integrity Marketing | 16 |
| Technology - Systems and Services..... | 17 |
| Premier Software | 17 |
| Ruby Receptionists..... | 17 |
| IN-A-BIND, Inc. | 19 |
| Practice Building..... | 20 |
| Southern California Institute..... | 20 |
| Ultimate Estate Planner | 20 |
| The Million Dollar Lawyer | 20 |
| Residence and Citizenship Planning..... | 22 |
| Henley & Partners..... | 22 |

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| | |
|---|----|
| Trust Service /Banking / Investments | 23 |
| Alliance Trust Company | 23 |
| Bankers Trust | 23 |
| The Bryn Mawr Trust Company of Delaware..... | 23 |
| Premier Trust | 24 |
| South Dakota Planning Company | 24 |
| Wyoming Trust..... | 26 |
| Yellowstone Trust Administration | 26 |
| Trust Administration & Accounting | 28 |
| ONESOURCE Trusts & Admin, Tax & Accounting..... | 28 |
| Valuations | 29 |
| Nationwide Valuations..... | 29 |
| CBIZ Valuation Group, LLC | 29 |

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Asset Transfers & Funding Services

Transfer Assist

CONTACT: Karol Whitaker
WEB SITE: <http://www.focusonthefunding.com>
PHONE: (423) 899-8555
EMAIL: karol@focusonthefunding.com
CITY: Chattanooga
ST: TN

SPECIALIZING IN:

Funding Process - Our goal is to make the funding process as seamless as possible. We are passionate that every client's Trust is fully funded and will work at their death, meaning it will avoid probate. We provide a customized Transfer Kit™ for each client, which is the folder containing the letters, forms and instructions to accomplish the funding for your client's Trust.

Auctions

Heritage Auctions

CONTACT: Carolyn Mani
WEB SITE: <http://www.ha.com>
PHONE: (310) 492-8614
EMAIL: carolynm@ha.com
CITY: Veverly Hills
ST: CA

SPECIALIZING IN:

The World's Largest Collectibles Auctioneer

Compliments of



Associations

NAEPC National Association of Estate Planners & Councils

CONTACT: Eleanor Spuhler
WEB SITE: <http://www.naepc.org>
PHONE: (866) 226-2224
EMAIL: eleanor@naepc.org
CITY: Cleveland
ST: OH

SPECIALIZING IN:

The National Association of Estate Planners & Councils (NAEPC) is a national organization of affiliated estate planning councils and professional estate planners focused on establishing and monitoring the highest professional and educational standards. NAEPC provides public awareness of the services rendered by multi-disciplinary professionals who meet these standards and believes that the team approach to estate planning best serves the client.

Compliments of



Elder Care Services

Senior Care Advisors

CONTACT: Brett Billings
WEB SITE: <http://www.scachattanooga.com>
PHONE: (423) 432-7514
EMAIL: brett@scachattanooga.com
CITY: Chattanooga
ST: TN

SPECIALIZING IN:

Senior Care Advisors is an independent eldercare planning company based in Chattanooga, TN. Established in early 2010, founder Brett Billings sought out to provide insightful, client-focused advice for seniors facing challenging decisions regarding their eldercare needs. Families face making a great number of choices when caring for a loved one - from service providers, care needs, and how to pay for the care.

LifeCare Funding

CONTACT: Don Poole
WEB SITE: <http://www.lifecarefunding.com>
PHONE: (888) 670-7773
EMAIL: dpoole@lifecarefunding.com
CITY: Rye
ST: NY

SPECIALIZING IN:

Funding solutions for senior living.

True Link Financial

CONTACT: Julia Otis
WEB SITE: <http://www.truelinkfinancial.com>
PHONE: (415) 662-3713

Compliments of



EMAIL: julia@truelinkfinancial.com
CITY: San Francisco
ST: CA

SPECIALIZING IN:

True Link protects seniors from becoming victims of fraud, identity theft, and scams by providing financial tools for older adults and their families.

Emergency ID , Online Documents, Digital Asset Management

SafelyFiled / SafelyMD (Agent: Premier Software)

CONTACT: Tom Caffrey
WEB SITE: <http://www.premiersoftware.com>
PHONE: (856) 429-3010
EMAIL: tcaffrey@premiersoftware.com
CITY: Chery Hill
ST: NJ

SPECIALIZING IN:

LexisNexis Time Matters law practice management sales and support since 1985.
Specializing in Estate planning, elder law, civil litigation.
Proficient in solving mail list management, marketing event management, CRM, Matter Management, prospect tracking, document automation, document management, email management, asset tracking and funding, scanning/paperless office, automated reporting, automated pdf based client intake, annual client retainer/maintenance.
Integration with Billing Matters, PCLaw, Quickbooks, and Office 365.
Provider of hosted or on-site servers nationally.

DCS Directive Communication Systems

CONTACT: Lee Poskanzer
WEB SITE: <http://www.directivecommunications.com>
PHONE: (401) 301-5337

Compliments of



EMAIL: lposkanzer@directivecommunications.com

CITY:

ST:

SPECIALIZING IN:

DCS, the first and only estate management solution assisting attorneys and personal representatives organize and contact personal accounts to fulfill an individual's final wishes.

Compliments of



Docubank

CONTACT: Mike Wall
WEB SITE: <http://www.docubank.com>
PHONE: (610) 667-3524
EMAIL: mwall@docubank.com
CITY: Narberth
ST: PA

SPECIALIZING IN:
Instant Access to Vital Documents

Legal Directives

CONTACT: Judd Ahrens
WEB SITE: <http://www.legaldirectives.com>
PHONE: (866) 363-4894
EMAIL: judd@legaldirectives.com
CITY: Dillsburg
ST: PA

SPECIALIZING IN:
Legal Directives, LLC provides immediate access to your healthcare power of attorney, living will, HIPAA authorization, emergency contact information, physician information and allergies and medical conditions

Filing Document Processing Services

Parasec

CONTACT: Michael Breedlove
WEB SITE: <http://www.parasec.com>
PHONE: (888) 272-5450
EMAIL: mbreedlove@parasec.com

Compliments of



CITY: Sacramento
ST: CA

SPECIALIZING IN:

At Parasec, our objective has always been to deliver unparalleled customer service and high-quality work to our clients. Since 1977, our clients have relied upon our expertise, speed and extensive industry knowledge-turning to us for all of their document filing and retrieval needs.

Financial Consulting Services

CSSC Consulting Services Support Corp.

CONTACT: Eric Smith
WEB SITE: <http://www.cssc.com>
PHONE: (888) 844-2772
EMAIL: esmith@cssc.com
CITY: Troy
ST: MI

SPECIALIZING IN:

Our Mission is to fundamentally change the way financial services are rendered, by transferring the balance of power away from traditional brokers, investment consultants, and vendors of financial products into the hands of the investing public, where it belongs - by creating unique, proprietary, and patented technology and methodologies - and thusly creating, in the process,

Gryphon Financial Solutions

CONTACT: Barry Slocum
WEB SITE: <http://www.gryphonfinancialsolutions.com>
PHONE: (888) 673-2504
EMAIL: bslocum@gryphonfinancialsolutions.com
CITY: San Diego
ST: CA

SPECIALIZING IN:

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Our Brand Promise is 'Responsive Solutions, Unwavering Integrity'. Gryphon Financial Solutions is an Independent Marketing Organization educating and training select financial advisors to deliver responsive solutions with unwavering integrity.

Innovative Shareholder Strategies, LLC

CONTACT: Cally Johnson
WEB SITE: <http://www.issadvisors.com>
PHONE: (718) 619-8502
EMAIL: cjohnson@issadvisors.com
CITY: Naperville
ST: IL

SPECIALIZING IN:

ISS is an investment banking advisory firm specializing in merger and acquisition consulting, Employee Stock Ownership Plan ("ESOP") implementation, and debt and equity placement.

Our professionals have the modeling capability and structuring expertise to analyze an organization's financial performance and devise the optimal strategy for a company and its shareholders.

Lodmell & Lodmell, P.C.

CONTACT: Ian Hasegawa
WEB SITE: <http://www.lodmell.com>
PHONE: (602) 230-2014
EMAIL: ian.hasegawa@lodmell.com
CITY: Phoenix
ST: AZ

SPECIALIZING IN:

Lodmell & Lodmell provides asset protection services to over 3,500 clients nationwide.

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Matsen Voorhees Mintz LLP

CONTACT: Lisa Allred
WEB SITE: <http://www.mvmlawyers.com>
PHONE: (714) 384-6580
EMAIL: lallred@matsenvoorhees.com
CITY: Costa Mesa
ST: CA

SPECIALIZING IN:
High Net Worth Client – Professional Collaboration

Penton Wealth Management

CONTACT: Julius Picardi
WEB SITE: <http://www.penton.com>
PHONE: (212) 204-4254
EMAIL: julius.picardi@penton.com
CITY: New York
ST: NY

SPECIALIZING IN:
Penton empowers 18 million business professionals with the tools they need to do their jobs better. Penton serves its users and service providers with our comprehensive marketing solutions.
INFORM / ENGAGE / ADVANCE

Compliments of



Gifts

Make A Wish

CONTACT: Mark Simonson
WEB SITE: <http://www.wish.org/plannedgiving>
PHONE: (800) 722-9474
EMAIL: msimonson@wish.org
CITY: Phoenix
ST: AZ

SPECIALIZING IN:
Leave a Legacy of Hope

You have the power to make wishes come true well beyond your lifetime. Through a type of contribution called a planned gift, you can make a lasting commitment to the Make-A-Wish® Foundation, ensuring that we can continue to give hope, strength and joy to future generations of children with life-threatening medical conditions. A planned gift is a simple, meaningful way to make a difference, and you've come to the right place to learn more.

NRA

CONTACT: Wm. Kent Smith
WEB SITE: <http://www.nrahq.org>
PHONE: (512) 787-2535
EMAIL: kentsmith@nrahq.org
CITY: Angel Fire
ST: NM

SPECIALIZING IN:
Donor Centered Relationships

Compliments of



Insurance Products & Services

Krause Financial Services

CONTACT: Amber Gouin
WEB SITE: <http://www.medicaidannuity.com>
PHONE: (866) 605-7437
EMAIL: ambergouin@medicaidannuity.com
CITY:
ST:

SPECIALIZING IN:

Catering to elder law attorneys and insurance agents nationwide, Krause Financial Services specializes in helping families qualify for Medicaid and Veterans Benefits through the use of insurance products.

Medicaid Annuity

Melville Capital Life Settlements

CONTACT: Doug Himmel
WEB SITE: <http://www.melvillecapital.com>
PHONE: (310) 943-5370
EMAIL: dhimmel@melvillecapital.com
CITY: Littleton
ST: CO

SPECIALIZING IN:

We help policy owners obtain TRUE MARKET VALUE for their existing life insurance policies. Melville Capital is a Life Settlement Advisor and Broker focused on monetizing existing Life Insurance Policies in situations where the policy has become unwanted or unneeded.

Active Captive Management

CONTACT: Cinda Carbone
WEB SITE: <http://www.activecaptive.com>
PHONE: (800) 921-0155

Compliments of



EMAIL: ccarbone@activecaptive.com

CITY: Laguna Hills

ST: CA

SPECIALIZING IN:

Active Captive Management (ACM) specializes in the formation and management of captive insurance companies for the middle market.

ClaimJockey

CONTACT: Ashley McCarter

WEB SITE: <http://www.claimjockey.com>

PHONE: (800) 791-6524

EMAIL: amccarter@claimjockey.com

CITY:

ST:

SPECIALIZING IN:

Long Term Care Claim Specialists

Law Firm Marketing

BAU Mail & Print

CONTACT: Pamela Smith

WEB SITE: <http://www.baumail.com>

PHONE: (800) 956-7106

EMAIL: pam@baumail.com

CITY: Wilmington

ST: NC

SPECIALIZING IN:

Seminar Marketing

Compliments of



Integrity Marketing

CONTACT: James Campbell

WEB SITE: <http://www.integritymarketingsolutions.com>

PHONE:

EMAIL: james@estateplanningpartners.com

CITY: Olathe

ST: KS

SPECIALIZING IN:

Experts in Estate Planning Marketing.

Websites, Social Media, Newsletters

Compliments of



Technology - Systems and Services

(Contact, Matter, Documents, Email, Phone, Billing, Management Reporting)

Premier Software

CONTACT: Tom Caffrey
WEB SITE: <http://www.premiersoftware.com>
PHONE: (856) 429-3010
EMAIL: tcaffrey@premiersoftware.com
CITY: Chery Hill
ST: NJ

SPECIALIZING IN:

LexisNexis Time Matters law practice management sales and support since 1985.
Specializing in Estate planning, elder law, civil litigation.
Proficient in solving mail list management, marketing event management, CRM, Matter Management, prospect tracking, document automation, document management, email management, asset tracking and funding, scanning/paperless office, automated reporting, automated pdf based client intake, annual client retainer/maintenance.
Integration with Billing Matters, PCLaw, Quickbooks, and Office 365.
Provider of hosted or on-site servers nationally.

Ruby Receptionists

CONTACT: Ashley Fisher
WEB SITE: <http://www.callruby.com>
PHONE: (866) 611-7829
EMAIL: afisher@callruby.com
CITY: Portland
ST: WA

SPECIALIZING IN:

Meet Ruby, your real, live virtual receptionist. Ruby is the smart and cheerful team of virtual receptionists trained to make a difference in your day. From our offices in Portland, Oregon, we handle your calls with care.

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IN-A-BIND, Inc.

CONTACT: Michael Salkind
WEB SITE: <http://www.inabindinc.com>
PHONE: (703) 569-0371
EMAIL: inabind@verizon.net
CITY:
ST:

SPECIALIZING IN:

In-A-Bind, Incorporated was established in 1987 by Michael Salkind, in order to provide better service to his existing accounts. By listening to the clients and their needs, In-A-Bind has developed into the full service company that it is today. We have a concept to production team that will assist you in your project. We take the place of your reliance of several different suppliers to complete your seminar, convention or other presentation packages. We specialize in high quality products, while keeping your budget concerns in the forefront. We have over 30 years of experience in assisting clients with their projects.

Compliments of



Practice Building

Southern California Institute

CONTACT: Shelly Lightfoot
WEB SITE: <http://www.scinstitute.org>
PHONE: (858) 200-1911
EMAIL: sl@scinstitute.org
CITY: San Diego
ST: CA

SPECIALIZING IN:

The Southern California Institute provides high-quality collaborative educational and informational events relying on active professional experts. This enables the institute to consistently present materials in a team-teaching environment. As a result, advisors and their clients are able to gather the best facts, opinions, judgements, and perceptions from diverse, reliable sources. SCI strives to improve the lives of: Successful Families, Business Owners, Real Estate Owners, Independent Collaborative Advisors (ICAs)

Ultimate Estate Planner

CONTACT: Kristina Schneider
WEB SITE: <http://www.ultimateestateplanner.com>
PHONE: (866) 754-6477
EMAIL: kristina@ultimateestateplanner.com
CITY: Redondo Beach
ST: CA

SPECIALIZING IN:

The Ultimate Estate Planner, Inc. offers a variety of resources to estate planning professionals, including educational teleconferences with some of the nation's leading experts on a variety of topics, unique and cutting-edge legal document forms like the IRA Inheritance Trust®, seminar marketing products, practice-building tools, and much more!

The Million Dollar Lawyer

CONTACT: Julie Steinbacher

Compliments of



WEB SITE: <http://www.planningandprotecting.com>

PHONE: (800) 785-9569

EMAIL: julie@themilliondollarlawyer.com

CITY: Willimspport

ST: PA

SPECIALIZING IN: Marketing and Practice Building

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Residence and Citizenship Planning

Henley & Partners

CONTACT: Jon Green
WEB SITE: <http://www.henleyglobal.com>
PHONE: (604) 239-2170
EMAIL: jon.green@henleyglobal.com
CITY: Vancouver
ST: B.C.

SPECIALIZING IN:

The Global Leaders in Residence and Citizenship Planning

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Trust Service /Banking / Investments

Alliance Trust Company

CONTACT: Phillip Brown
WEB SITE: <http://www.alliancetrustcompany.com>
PHONE: (775) 297-4277
EMAIL: pbrown@alliancetrustcompany.com
CITY: Reno
ST: NV

SPECIALIZING IN:

Nevada Trust Advantages with Alliance

Alliance Trust Company is a full service trust company licensed and located in the State of Nevada which offers trust clients and financial advisors a flexible trustee available to serve in multiple capacities based on the needs of the client.

Bankers Trust

CONTACT: Scott Johnson
WEB SITE: <http://www.bankerstrust.com>
PHONE: (800) 362-1688
EMAIL: sjohnson@bankerstrust.com
CITY: Des Moines
ST: IA

SPECIALIZING IN:

Wealth Planning & Strategy

The Bryn Mawr Trust Company of Delaware

CONTACT: Susan Callahan
WEB SITE: <http://www.bmtc.com>
PHONE: (302) 798-1793
EMAIL: scallahan@bmtc.com
CITY: Greenville
ST: DE

SPECIALIZING IN:

Compliments of



WEALTH MANAGEMENT - CONFIDENCE BUILT ON KNOWLEDGE

Knowledge, experience, a history of service and people who excel at what they do; it's what makes Bryn Mawr Trust a world-class wealth management and investment firm, earning our clients' trust for over a century. We provide a full range of services- investment strategies, trust oversight, philanthropic advising, private banking, and more-with just one focus, to protect and grow your wealth.

Premier Trust

CONTACT: Gino Pascucci
WEB SITE: <http://www.premiertrust.com>
PHONE: (775) 473-2200
EMAIL: gpascucci@premiertrust.com
CITY: Reno
ST: NV

SPECIALIZING IN:

PREMIER TRUST "YOUR TRUST SERVICES PARTNER "

Premier Trust is a Nevada chartered trust company providing independent administrative trustee services to our clients all across this great nation who want to benefit from the Nevada Advantage; Nevada's favorable trust, corporate, asset protection and tax laws.

South Dakota Planning Company

CONTACT: James Paladino
WEB SITE: <http://www.sdtrustco.com>
PHONE: (212) 642-8377
EMAIL: spaladino@sdplanco.com
CITY: Sioux Falls
ST: SD

SPECIALIZING IN:

South Dakota Planning Company, LLC (SDPC) is an estate planning and trust advisory firm, founded by Al W. King III and Pierce H. McDowell III, that advises both domestic

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and international clients. SDPC, a Delaware LLC doing business in New York City, works closely with its sister company, South Dakota Trust Company LLC (SDTC), which is an independent trust company, headquartered in Sioux Falls, South Dakota, specializing in providing trust administration for the wealthy. SDPC and SDTC are wholly owned subsidiaries of Third Constellation, LLC, a Delaware LLC, based in New York City.

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Wyoming Trust

CONTACT: Tasma Powers
WEB SITE: <http://www.wyotrust.com>
PHONE: (307) 234-3070
EMAIL: tpowers@wyotrust.com
CITY: Casper
ST: WY

SPECIALIZING IN:

Wyoming Trust Company is an independent trust company chartered by the Wyoming Banking Commission. We specialize in trust administration and are not directly involved in making investments of trust assets.

Wyoming laws allow for the trustmaker to direct Wyoming Trust Company to follow the investment choices of a financial advisor.

Wyoming laws allow for families to self-trustee through the use of a Private Family Trust Company. Wyoming Private Family Trust Company Characteristics

Yellowstone Trust Administration

CONTACT: Randy Huston
WEB SITE: <http://www.yellowstoneta.com>
PHONE: (406) 255-8685
EMAIL: yellowstoneta@yellowstoneta.com
CITY: Billings
ST: MT

SPECIALIZING IN:

THIRD PARTY ADMINISTRATORS

The mission of Yellowstone Trust Administration, Inc. is to provide the highest quality service in the administration of Charitable Remainder Trusts and Charitable Lead Trusts.

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Trust Administration & Accounting

ONESOURCE Trusts & Admin, Tax & Accounting

CONTACT: Gerald Urban

WEB SITE:

<https://tax.thomsonreuters.com/products/brands/onesource/trust-estate/>

PHONE: (888) 250-5276

EMAIL: Gerald.Urban@thomsonreuters.com

CITY: Philadelphia

ST: PA

SPECIALIZING IN:

Trust Estate:

A start-to-finish process for administering trusts and estates

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Valuations

Nationwide Valuations

CONTACT: John Mack
WEB SITE: <http://www.nationwidevaluations.com>
PHONE:
EMAIL: john@nationwidevaluations.com
CITY:
ST:

SPECIALIZING IN:
Business Valuation Specialists

CBIZ Valuation Group, LLC

CONTACT: Adam McArthur
WEB SITE: <http://www.cbizvaluation.com>
PHONE: (747) 220-6744
EMAIL: amcarthur@cbizvaluation.com
CITY: Los Angeles
ST: CA

SPECIALIZING IN:
Valuation and Litigation Support
