



Hampton Roads Estate Planning Council

2017–2018 **DIRECTORY**

The premiere tool to reach practicing attorneys, certified public accountants, chartered life underwriters, non-profit executives, trust officers and other qualified licensed professionals throughout Hampton Roads.



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GREETINGS FROM THE PRESIDENT



*Todd J. Preti, J.D., ESQ, AEP®
2017/2018 President*

As the Hampton Roads Estate Planning Council begins its 46th year, I want to welcome all of our members to what we know will be another successful year fulfilling our mission to provide quality estate planning education to its members in all facets of estate planning. The board also plans to expand on its previous endeavors to network with other professional groups.

We plan to continue the tradition of providing diverse and engaging speakers who will provide knowledgeable information in their area of expertise. This will also give our members an opportunity to network and ultimately forge a strong base of available resources. Networking, along with continuing education and sound council leadership will help the Hampton Roads Estate Planning Council continue to grow.

In the 2017/2018 calendar year we hope that through the sponsorship of a cocktail hour or dinner meeting, placing ads in our directory and encouraging qualified members of your firm to join us, we will have continued growth leading to another successful year. I encourage all of you to share your recommendations with the board on how to strengthen and improve our Council.

I look forward to seeing each of you at our meetings and your continued participation in our Council.

Sincerely,

Todd J. Preti, J.D., ESQ, AEP®



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MEMBERSHIP DIRECTORY

ABOUT THE DIRECTORY

The Hampton Roads Estate Planning Council was established to improve the quality of estate planning services to the general public by providing educational programming for the professionals engaged in the drafting, administration and execution of estate plans, and developing a greater cooperation of the role each discipline plays in the process. Since it began in 1971, HREPC membership has grown to over 145 members. This directory is the premiere tool for reaching members in Hampton Roads, providing a complete listing of all of our current HREPC members in a concise, easy-to-use format.

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ACCURACY OF MEMBER DATA

Every effort is made to ensure the accuracy of the information in the directory. The Hampton Roads Estate Planning Council does not guarantee the book to be free of errors or inadvertent omissions. Membership data collection is conducted at the time of dues collection and updated upon notification to the HREPC office.

Listings reflect members in good standing as of August 18, 2017. Additions, deletions and transfers after that date are not shown. Please keep HREPC updated of future changes by sending notification in writing by mail, fax or email.

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2017-2018 PROGRAMS

SEPTEMBER 19, 2017

Speaker: Elizabeth Leverage Hilles, UVA Law School Foundation
Topic: Assessing and Planning for Clients' Charitable Goals
Sponsors: (Cocktails & Dinner) Hampton Roads Community Foundation and St. Mary's Home

NOVEMBER 28, 2017

Speaker: Virginia Esposito, President & CEO of the National Center for Family Philanthropy
Topic: Trends in Family Philanthropy
Sponsors: (Cocktail Hour) Old Point Trust
(Dinner) Hampton Roads Community Foundation

JANUARY 18, 2018

Speaker: Daniel J. Durst, Attorney, Williams Mullen
Topic: Virginia's New Elective Share Law
Sponsors: (Cocktail hour) Midgett & Preti PC
(Dinner) Union Bank & Trust

MARCH 20, 2018

Speaker: Charles Redstone, New York Life Insurance Company, Regional Sales Director, Retired
Topic: LTC Industry Updates: Who/What Pays
Sponsors: (Cocktail Hour) Lake Taylor Transitional Care Hospital Foundation
(Dinner) TBD

MAY 15, 2018

Speaker: Jordon Rosen, CPA, Belfint Lyons Shuman, P.A.
Topic: Tax Related
Sponsors: (Cocktail hour) Wall, Einhorn & Chernitzer, P.C.
(Dinner) TBD

NAEPC is hosting several webinars in the upcoming months, please visit www.HREPC.org/events for dates and full details.

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Attorneys:*

S. Beryl Adler
(757) 490-6267
sadler@pendercoward.com

D. Rossen S. Greene
(757) 502-7333
rgreene@pendercoward.com

Mark R. Baumgartner
(757) 490-6276
mrb@pendercoward.com

H. Alexander Johnson
(757) 490-6254
ajohnson@pendercoward.com

JoAnn Blair-Davis
(757) 490-6263
jabdavis@pendercoward.com

Burke W. Margulies
(757) 490-6275
bmarguli@pendercoward.com

Jessica M. Booth
(757) 490-6269
jbooth@pendercoward.com

Daniel M. Schieble
(757) 490-6262
dschiebl@pendercoward.com

Kathryn Byler
(757) 490-6292
kbyler@pendercoward.com

E. Diane Thompson
(757) 502-7329
dthompson@pendercoward.com

Chesapeake (757) 490-2900 Virginia Beach (757) 490-3000 Suffolk (757) 502-7345

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Midgett & Preti PC

HREPC HEADQUARTERS

Executive Director Cindy Matthews
P: 757-410-8032 | F: 757-473-9897
E: cmatthews@managegroup.com

Graphic Designer Courtney Lynch
P: 757-410-8032 | F: 757-473-9897
E: clynch@managegroup.com

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The Accredited Estate Planner® (AEP®) designation is a graduate level specialization in estate planning, obtained in addition to already recognized professional credentials within the various disciplines of estate planning. It is awarded by the National Association of Estate Planners & Councils (NAEPC) to recognize estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation, and character. As part of NAEPC's advocacy program, designation holders will be given priority in requests for referrals within each professional discipline that result from NAEPC promotion and advertising campaigns. In addition, NAEPC promotion and advertising will prominently feature the AEP® designation and the advantages of working with a professional who holds this special accreditation.

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ARTICLES AND BYLAWS

1. NAME

- 1.01** The name of this Association shall be “HAMPTON ROADS ESTATE PLANNING COUNCIL”, sometimes herein referred to as the “Council”.

2. OBJECTS, MISSION & PURPOSE

- 2.01** Mission: The mission of the Council shall be to promote the multi-disciplinary approach to estate planning by supporting its Members; encouraging cooperation among Members to create a thorough and comprehensive estate plan for their clients and a better understanding of the role each Member plays in the process; and to provide education and learning opportunities for its Members and to increase public awareness of the importance of estate planning by a team of professional advisers.
- 2.02** Vision: The Council seeks to provide opportunities for education and learning for its Members so as to promote proper estate planning methods and to provide confidence and guidance in the estate planning process.
- 2.03** Purposes: The specific purposes of the Council are:
1. To serve the best interests of the public, and to promote and enhance the welfare, ethical standards, and best interests of Council and its Members.
 2. To establish and maintain a common meeting ground and medium for communication among Council Members, and to promote understanding and harmony among them and with the general public.
 3. To improve the stature of the Council and its Members through self-discipline and educational programs, and to improve their qualifications to serve the public and, particularly, their clients.
 4. To encourage talented students with high potential to enter the field of estate planning by mentoring and/or sponsoring and implementing vocational guidance and scholarship programs.
 5. To promote standards of excellence in its Members.
 6. To encourage Members in obtaining accreditation as an “Accredited Estate Planner” and/or as an “Estate Planning Law Specialist” by the National Association of Estate Planners and Councils.

3. MEMBERSHIP

- 3.01** Membership of this Council shall consist of those who have first been proposed by the Membership Committee and subsequently elected by majority vote of the Executive Committee.

3.02 There shall be no limit to the overall size of the Council.

3.03 Membership in the Council shall be restricted to those who devote a significant portion of their occupational or professional time and effort to performing research and/or rendering advice for the purpose of assisting clients or customers in the accumulation of wealth, avoidance of unnecessary taxes on such estates, planning the disposition and transfer of, postmortem planning and administration of estates, charitable planning or planned giving and who are actively engaged in one or more of the following occupations:

- a. Attorneys-at-Law, who are licensed and admitted to practice before the highest court of the state by which licensed;
- b. Certified Public Accountants, who hold a current license;
- c. Trust Officers, employed by bank trust departments and independent trust companies;
- d. Chartered Life Underwriters, who hold a current license.
- e. Full time employees of recognized tax-exempt organizations, whose primary occupation or job responsibility is the advising of actual and potential donors to such organizations of charitable or planned giving options, including, but not limited to the income, gift and estate tax consequences of such options;
- f. Other licensed or accredited professionals who, in the discretion of the Executive Committee, have the education, training, experience and qualities necessary for Membership, including but not limited to:
 1. Certified Financial Planners
 2. Chartered Financial Consultants

And who are actively engaged for three (3) years or more in one or more of the following activities:

- Administering estates and trusts
- Analyzing existing life insurance coverage for continuing relevance
- Analyzing proposed transactions for estate and gift tax implications
- Attending estate planning council meetings and other estate planning or educational events
- Business succession planning
- Charitable/gifting planning
- Designing estate plans
- Designing qualified and non-qualified retirement plans
- Developing strategies to minimize potential estate and gift taxed
- Developing programs to conserve assets during lifetime and at death
- Drafting estate planning documents
- Life settlements of life insurance policies
- Preparing estate and gift tax returns

- Preparing fiduciary accountings
- Preparing fiduciary income tax returns
- Probating wills & administering estates
- Proposing life insurance solutions consistent with estate plans
- Retirement distribution planning
- Succession planning

3.03.1 Associate Member Status. In order to continue the growth of the Council and to encourage new professional to join, the Council intends to allow new professionals, meeting the Section 3.03 membership requirements but lacking the requisite three (3) years of experience, to apply for Associate Member status.

The Council shall include a second class of Members called "Associate Members." The requirements for an Associate Member shall be the same as for a Member, as set forth in Section 3.03 of the Bylaws, except than an Associate Member must be actively engaged in his/her profession for less than three (3) years.

An Associate Member shall enjoy all the rights, privileges and responsibilities of a Member, except that an Associate Member shall have no voting rights.

Upon reaching three (3) years of active engagement in his/her profession, an Associate Member shall, at the next renewal of his/her membership, apply as a Member.

3.03.2 Emeritus Member Status. In order to continue the growth of the Council and to encourage retiring professionals to retain their membership, the Council intends to allow retiring Members to apply for Emeritus Member status. An Emeritus Member shall meet all of the requirements under Section 3.03 of the Bylaws except that an Emeritus Member need not be actively engaged in his/her profession. Therefore, the Council shall include a third class of Members, called "Emeritus Members." An Emeritus Member shall enjoy all the rights, privileges and responsibilities of a Member, including voting rights.

3.04 No new Members shall be elected by the Executive Committee if such election would cause an occupational category to constitute more than forty percent (40%) of the total membership of the Council. No Member in good standing shall be expelled if attrition by Members of other professions causes any profession to exceed the above state limitation on Membership.

3.05 Membership in the Council, or any rights thereunder, is not transferable.

3.06 Termination of Membership.

3.06.1 Delinquency. A Member shall become delinquent if annual dues are not paid within sixty (60) days of the initial dues notification. A notice of delinquency

shall be given and the Membership shall be terminated if payment is not made within thirty (30) days of such delinquency notice. Any individual whose Membership has been terminated for reasons of delinquency may be reinstated according to procedures as may be established by the Executive Committee from time to time. The Board may decline to reinstate Members whose Membership has been terminated for reasons of delinquency.

- 3.06.2** Discipline. By a two-thirds (2/3) affirmative vote, the Executive Committee may expel a Member for any cause which, in its judgment, is deemed sufficient, provided that said cause is fair and reasonable. No Member shall be expelled until he or she has been notified pursuant to Section 3.06 (Termination of Membership, Procedure) herein. If no response is received within the time limit set forth in the notice, the Member may be automatically expelled. Upon expulsion under this section, all rights and privileges of Membership of the expelled Member are terminated and any Membership certificate shall be surrendered to the Council by the expelled Member. The Member shall be liable for all costs, including, but not limited to, attorney's fees, incurred by the Council in seeking collection of delinquent Membership dues, and in seeking injunctions prohibiting the expelled Member from claiming Membership after the expulsion.
- 3.06.3** Death. A Member's Membership in the Council is automatically terminated upon that Member's death.
- 3.06.4** Incapacity. A Member's Membership in the Council is automatically suspended upon that Member's incapacity (in the sole opinion of the Executive Committee). If the incapacity is cured or otherwise removed, then the incapacitated Member's suspension may be lifted and the Member reinstated upon petition to the Executive Committee for such reinstatement.
- 3.06.5** Resignation. A Member desiring to resign shall submit in writing notification to the Executive Committee for its action. This notification does not relieve the Member of any dues owed at the time of the notification. Membership shall be terminated upon the acceptance of the resignation by the Executive Committee.
- 3.06.6** Procedure. Any Member's rights may be terminated or suspended or the Member expelled pursuant to any procedure that is fair and reasonable and is carried out in good faith. The Member should be notified in writing at least fifteen (15) days prior to the expulsion or termination or suspension of his/her Membership and the reasons for said expulsion, termination, or suspension. At least five (5) days before the proposed expulsion of the Member or the proposed termination or suspension of the Member's Membership, the Member may provide to the Executive Committee a written explanation of why the proposed expulsion, termination, or suspension should not take place. The Executive Committee may also allow, but is not required to do so, the Member to give oral testimony before the Executive Committee on that Member's behalf

to request that no expulsion, termination, or suspension be instituted. If an Executive Committee meeting is held to consider a written statement by the Member or an oral hearing is held, a decision shall be made and conveyed in writing to the Member within thirty (30) days of said Executive Committee meeting or hearing date. Immediate expulsion of a Member or termination or suspension of a Member's Membership may take place prior to the end of the fifteen (15) days notice period required above, if such termination or suspension is fair and reasonable taking into consideration all of the relevant facts and circumstances. Any written notice given by mail must be given by first-class or certified mail sent to the last address of the Member shown on the Council's records. Any proceeding challenging an expulsion, termination or suspension, including a proceeding in which defective notice is alleged, must be commenced within one (1) year after the effective date of the expulsion, termination or suspension.

- 3.06.7** Obligation of Member for Dues. A Member who has resigned, been expelled, or whose Membership has been terminated or suspended may be liable to the Council for dues, assessments or fees as a result of obligations incurred or commitments made prior to such resignation, expulsion, termination, or suspension. Dues are incurred at the beginning of each fiscal year and no refunds shall be given for expulsion, termination, suspension or resignation, unless otherwise indicated in the By Laws for certain rare circumstances.
- 3.07** A Member of the Council is required to conduct himself/herself at all times in the following manner:
- a. To uphold the integrity and honor of the profession and to encourage respect for it. This involves promoting the continual development of the estate planning industry, as well as the Member's respective specialization.
 - b. To be fair. This requires that a professional treat others as he/she would wish to be treated if in the other's position. It also means that a Member shall disclose conflicts of interest in providing estate planning services.
 - c. To continually improve his/her knowledge, skill, and competence throughout his/her working life.
 - d. To do the utmost to attain a distinguished record of professional service based upon diligence. This means that a Member must act with patience, timeliness, and consistency, and do so in a prompt and thorough manner in the service of others.
 - e. To support the established institutions and organizations concerned with the integrity of his/her profession.
 - f. To respect the confidentiality of any information entrusted to, or obtained in the course of, the Member's business or professional activities.
 - g. To regulate himself or herself. That is, every Member has a two-fold

duty to abide by his/her other applicable professional codes of ethics, and to also facilitate the enforcement of this Code of Professional Responsibility. This also means expeditiously reporting breaches of professional responsibility, including one's own, to the Council. The Council will make all reasonable efforts to diligently investigate each reported breach and report such breach to the proper professional governing body, if the investigation results in a breach that requires reporting or the Council feels, in its sole opinion, that such breach merits reporting to the professional governing body. Nothing herein shall be construed to make the Council responsible for reporting such findings to the general public. Confirmed breaches will result in discipline by the Council, which may include dismissal for the most egregious offenses.

- h. To comply with all laws and regulations, in particular as they relate to professional and business activities.
- i. To cooperate with other Members, and other estate planning professionals, to enhance and maintain the estate planning profession's public image, and to work together to improve the quality of services rendered.

4. EXECUTIVE COMMITTEE

- 4.01 The governing body of the Council shall be known as the Board of Directors or Executive Committee, which shall possess and exercise all powers necessary for the government of the Council and the conduct of its business.
- 4.02 The Executive Committee shall be composed of the immediate Past President, the Officers (as set forth in Article 5.01) and the Directors (as set forth in Article 4.04).
- 4.03 Officers shall serve on the Executive Committee the term of one year in which they serve as officers or until their successors are elected and assume office.
- 4.04 The Directors of the council shall consist of seven (7) Members who shall be elected to serve a term of two (2) years or until their successors are elected and assume office. At least three (3) Directors shall begin their terms in odd numbered years and four (4) Directors shall begin their terms in even numbered years for the purpose of providing continuity of leadership on the Executive Committee through the use of staggered terms.
- 4.05 No more than two (2) Directors shall be members of the same occupational group unless there is no member of a particular occupational group who is willing to serve as a Director.
- 4.06 The Executive Committee, by concurrence of a majority of its members, shall have the power to fill, for an unexpired term, any vacancy which occurs either in its own body or in any office.

- 4.07 Meetings of the Executive Committee may be called at the President's discretion, or by three (3) Members of the Committee. The Executive Committee may establish such rules of procedure and practice as it may require for its meetings.

5. OFFICERS AND DIRECTORS

- 5.01 The officers of the Council shall consist of a President, First Vice President, Second Vice president, Secretary and Treasurer.
- 5.02 The officers shall hold office for one year or until their successors are elected and assume office, with a maximum of two (2) consecutive terms in any one office.
- 5.03 The office of President shall in no event be filled in successive years by Members of the same occupational group.*
*Pursuant to action by the Board of Directors/Executive Committee, Section 5.03 will not apply to the 2015-2016 and 2016-2017 fiscal years for the HREPC.
- 5.04 A Director or Officer shall discharge his or her duties as a Director or Officer, including his or her duties as a member of a committee, in good faith, with the care an ordinarily prudent person in a like position would exercise under similar circumstances, and in a manner he or she reasonably believes to be in the best interests of the Council. The Director or Officer is entitled to rely on information, opinions, reports, or statements, including financial statements and other financial data, if prepared or presented by:
 - 5.04.1 One or more Officers or employees of the Council whom the Director reasonably believes to be reliable and competent in the matters presented;
 - 5.04.2 Legal counsel, public accountants, or other persons employed by the Council as to matters the Director reasonably believes are within the person's professional or expert competence;
 - 5.04.3 A committee of the Executive Committee of which he is not a member if the Director reasonably believes the committee merits confidence; or
 - 5.04.4 Officer, director or employee of any management company regularly employed by the Council.
 - 5.04.5 A Director or Officer is not acting in good faith if said Director or Officer has knowledge concerning the matter in question that makes reliance otherwise permitted by this section unwarranted.

6. QUORUMS

- 6.01** Any six (6) Members of the Executive Committee shall constitute a quorum for the transaction of business.
- 6.02** Thirty-five percent (35%) of the membership of the entire Council shall constitute a quorum for the transaction of business.

7. NOMINATIONS AND ELECTIONS

- 7.01** The President shall, prior to the date of each annual meeting, appoint a Nominating Committee consisting of not less than three (3) and not more than five (5) Members of the Council (no more than two (2) from any occupational category) to submit a list of nominees for officers of the Council and for Members at large of the Executive Committee to be voted upon at the annual meeting. The immediate past president of the Council, if willing to serve, shall be a member of and Chair of the Nominating Committee. Said Committee shall cause the names of their nominees to be circulated to the membership of the Council prior to the date of the meeting.
- 7.02** In addition, officers and Members at large of the Executive Committee may be nominated from the floor at the annual meeting.
- 7.03** The candidates receiving the majority of votes of the Members present at the annual meeting shall be declared elected, and shall hold office until their successors are elected and assume office.
- 7.04** No Member may appoint a proxy to vote or otherwise act for such Member.

8. MEETINGS

- 8.01** The annual meeting of the Council shall normally be the last regular membership meeting of the Council's fiscal year, and shall be held during the Spring of each year at a time and place selected by the Executive Committee. The Secretary shall advise each member, by mail or other customary form or forms of communication regularly employed as notice to the Members, of the date and place selected at least ten (10) days in advance thereof.
- 8.02** The failure to hold an annual meeting at a time stated in or fixed by these By-Laws shall not affect the validity of any corporate action.
- 8.03** Meetings of the Members for the furtherance of the objectives of this Council may be called by the Executive Committee at stated times, or from time to time in its discretion.

- 8.04** The program of meetings of the Council shall be arranged by the Program Committee with the approval of the Executive Committee.
- 8.05** Any member may, in writing addressed to the Secretary, request the Executive Committee to bring up for discussion at any meeting, except the annual meeting, any matter, which, in the discretion of the Executive Committee is relevant to the mission of the Council, which may interest said Member.
- 8.06** A quorum of the Board of Directors consists of a majority of the Directors in office immediately before a meeting begins. In no event may the Bylaws authorize a quorum of fewer than the greater of either one-third (1/3) of the number of Directors in office or two (2) Directors.

9. COMMITTEES

- 9.01** The President shall appoint a Membership Committee composed of not more than five (5) Members (no more than two (2) from any occupational category), including the Second Vice President and not more than four (4) other members. The Second Vice President shall serve as Chair of this Committee. This Committee will meet, from time to time, at the discretion of its Chair, or when requested to do so by the Executive Committee, for the purpose of considering and proposing to the Executive Committee the names of potential new Members of the Council. Any three (3) Committee Members shall constitute a quorum.
- 9.02** The President shall appoint a Program Committee composed of not more than five (5) Members (no more than two (2) from any occupational category), including the First Vice President and not more than four (4) other members. The First Vice President shall serve as Chair of this Committee. This committee will meet, from time to time, at the discretion of its Chair, or when requested to do so by the Executive Committee. Any three (3) Committee Members shall constitute a quorum.
- 9.03** In addition, the President may appoint such other committees as he or she or the Executive committee shall deem advisable to further the interests of the Council and its members.

10. DUTIES OF OFFICERS

- 10.01** The President shall preside at all meetings of the Council and the Executive Committee, and perform the duties herein set out.
- 10.02** The First Vice President shall perform the duties of the President in the absence of the President, and shall serve as Chairman of the Program Committee.

- 10.03** The Second Vice President shall perform the duties of the President in the absence of the President and the First Vice President and shall serve as Chairman of the Membership Committee.
- 10.04** The Treasurer shall have custody of all funds and property of the Council. The Treasurer shall deposit all funds of the Council in the name of the Council in a financial institution having an office or branch in South Hampton Roads, Virginia. All withdrawals of such funds shall be on checks or orders signed by the Treasurer or such other officer(s) as designated by the Executive Committee. The Treasurer shall prepare and submit a statement of the financial condition of the Council at the annual meeting and at such other times and in such manner as the Executive Committee may require.
- 10.05** The Secretary shall keep a record of proceedings of all meetings of the Council and the Executive Committee, shall keep a current roster of all Members of the Council, shall be responsible for the mailing of notices of meetings and other communications to members, and shall be entitled to reimbursement for expenses so incurred.

11. EXPENSES AND DUES

- 11.01** The expenses of the Council, including the cost of meals at regular membership meetings, shall be provided for by payment of annual dues by the Members. The amount of dues for each year will be determined by the Executive Committee and shall be payable in advance on or before September 1st of each year. The Executive Committee may also offset the expenses of the Council by offering advertisements in the Council Directory or Sponsorships of the Membership Meetings or any portion or segment thereof.

12. FISCAL YEAR

- 12.01** The Council shall operate on a fiscal year basis beginning on July 1st of each year.
- 12.02** All officers and Members at large of the Executive Committee shall assume office immediately following the annual meeting at which they are elected.

13. ADVERTISEMENT

- 13.01** Membership in this Council shall not be used in any form by the member to solicit business, except through advertisement in the Council Directory or sponsorship of membership meetings, or any portion thereof or to advertise an expertise or competence in their respective professions. This prohibition shall not including a listing of membership in this Council in a resume, or similar publication.

14. AMENDMENTS

- 14.01** These Articles of Association and By-Laws may be amended in any one of the following ways:
- at any membership meeting of the Council by a vote of two-thirds (2/3) of the Members present, provided that notice setting forth the proposed amendment shall have been mailed to all Members at least five days prior to the date of such meeting; or
 - by unanimous vote of the Executive Committee with at least six (6) Members in attendance; or
 - by unanimous vote of the Members present at any membership meeting attended by a quorum.

15. INDEMNIFICATION

The Executive Committee shall have power to purchase and maintain insurance on behalf of any person who is or was a director or officer against any liability asserted against him or her and incurred by him or her in any such capacity or as a result of service at the request of the Council as a director, officer, employee or agent whether or not the Council would have the power to indemnify him or her against such liability under any provision of these By-Laws.

16. CONFLICT OF INTEREST POLICY

- 16.1** Conflict of Interest Transaction.
- Definition.** A conflict of interest transaction is a transaction with the Council in which a Director of the Council has a direct or indirect interest.
 - Methods of Acceptance of Transaction.** A conflict of interest transaction is not voidable by the Council or the basis for imposing liability on a Director solely because of a Director's interest in the transaction if any one (1) of the following is true:
 - in advance of the vote of the Board of Directors or a committee of the Board, the material facts of the transaction and the Director's interest were disclosed or known to the Board of Directors or committee of the Board of Directors and the Board of Directors or committee authorized, approved, or ratified the transaction;
 - in advance of the vote of the Members, the material facts of the transaction and the Director's interest were disclosed or known to the Members and they authorized, approved, or ratified the transaction;
 - before or after the transaction is consummated, the Board obtains the approval of the attorney general for the State or a court of competent jurisdiction approves the transaction in an action where the attorney general for the State is joined as a party;

4. or the transaction was fair at the time it was entered into.

16.2 Indirect Interest. A Director or Officer of the Council has an indirect interest in the transaction if, but not only if, another entity in which the Director or Officer has a material financial interest in is a party to the transaction; another entity in which the Director or Officer is a general partner is a party to the transaction; another entity in which the Director or Officer is a governor, director, manager, officer, or trustee is a party to the transaction. All such interest should be disclosed to and considered by the Board of Directors.

16.3 Authorization, Approval, and Ratification Under Section 16.1b1 Above. A conflict of interest transaction is authorized, approved or ratified if it receives the affirmative vote of a majority of the Board of Directors who have no direct or indirect interest in the transaction, but a transaction may not be authorized, approved, or ratified by a single Director. If a majority of the Directors who have no direct or indirect interest in the transaction vote to authorize, approve, or ratify the transaction, a quorum is present for the purpose of taking action under this section. The presence of, or a vote cast by, a Director with a direct or indirect interest in the transaction does not affect the validity of any action taken under this section, unless otherwise provided.

16.4 Authorization, Approval, and Ratification Under Section 16.1b2 Above. A conflict of interest transaction is authorized, approved or ratified if it receives the affirmative vote of a majority of the Members. Votes cast by or voted under the control of a Director who has a direct or indirect interest in the transaction, and votes cast by or voted under the control of an entity described in Section 16.2 (Indirect Interest), may not be counted in a vote of the Members to determine whether to authorize, approve, or ratify a conflict of interest transaction under this section. The vote of these Members, however, is counted in determining whether the transaction is approved under other sections of the Act. A majority of the voting power, whether or not present, that are entitled to be counted in a vote on the transaction under this section constitutes a quorum for the purpose of taking action under this subsection.

17. MEMBERSHIP IN NAEPC

The Council is required to be a member of the National Association of Estate Planning and Councils and abide by all rules and regulations set forth by the said NAEPC.

The foregoing Amended and Restated Bylaws of the Hampton Roads Estate Planning Council were adopted by unanimous vote of the Executive Committee, with at least seven members in attendance, pursuant to the provisions of Article 16 of the By-Laws then in effect on the 31st day of July, 2015. All amendments are effective as of July 31, 2016.



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- Stephen M. Jones, CPA, ABV, AEP
(Past Pres. 1997-98)
- Cathy C. Nadeau, CPA, AEP
- Henry T. Petersen, CPA, MSA, CFE
- Cathy P. Sawyer, CPA
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Mavis McKenley, AEP® CTFA

THE HISTORY OF HREPC

- In 1971 the Tidewater Estate Planning Council was formed. The group was made up of professional men who engaged in the practice of Estate Planning. The first President was Daniel Klein. Robert Nusbaum, one of the original chapter Presidents, stated that the creation of the council was used as an opportunity to bring together the estate planning community for networking opportunities. The attorneys at that time did not specialize in estate planning, but provided the service along with other specialties.
- The first meeting place for the TEPC was the Admiralty Motor Hotel located in Norfolk Virginia. Meetings were held at the Admiralty until November 1991 when they were moved to the Lake Wright Hotel.
- In 1992 the first Virginia Beach Foundation annual Estate Planning and Charitable Giving Seminar was co-sponsored with the Tidewater Estate Planning Council.
- The first female to serve on the Board of the estate planning council was Susan E Martin. Susan served as Secretary during the 1992-1993 year. Another notable woman to serve on the board in May of 1995 was Marian Ticatch. Membership totaled approximately 140 members at that time.
- In November of 1994 there was a request for a By-Law change to include an additional class of membership of professionals that engaged in estate planning such as CFA and CFP®. The number of members allowed under this designation would be 10%. The motion did not pass.
- In 1994 the Executive Committee under the leadership of Bob Powell sought information on the AEP® designation and in 2006 the chapter began sponsoring the AEP® designation. Bob Powell also started the practice as chapter President of sending condolence letters to the family of deceased members of the estate planning council.
- In 1995 the Executive Committee expressed concerns over the accommodations at the Lake Wright. The Board approved a move and began holding meetings at the Clarion Hotel on Bonney Road in Virginia Beach. The annual Dues were \$110 with membership of approximately 156 members.
- In 1997 a brief newsletter was started by Stephen Jones for the estate planning council.
- In 1998 the Executive Committee proposed the name change to HREPC under the leadership of Kevin Rack. Member surveys were sent requesting feedback on activities and speakers. The chapter also held a golf outing.

THE HISTORY OF HREPC

- During the 1999-2000 year, Joanne Chapman was the first female President of the HREPC. Edith Grandy, a Trust Officer was in line for the position of President, but did not serve.
- In November of 2003-2004 under the leadership of Hank Marriott, Non-Profits under section 3.03 (e) of the By-Laws were added as a membership class. A survey was sent out to the membership that also requested adding academia and retired practitioners as members at a reduced rate. Motion was passed, but excluded the academia and retired members as a membership class. Although academia would not be included in the membership the chapter invited many of the areas law professors to speak to the council on various topics. Notes in file suggest an invitation was sent to Judge Scalia to speak. Dennis Belcher was also a frequent speaker.
- Under the leadership of Robert Liberman during the 2004-2005 year, sponsorship opportunities and advertising in the membership directory began. CFP®s, and other licensed or accredited professionals were also added as a membership class under section 303 (f) of the By-Laws. The board also employed the services of OMG Office Business Solutions to maintain the administrative duties of the council. The location for the meetings was moved to the Town Center City Club and the Shrimp Rule was implemented ending the long standing policy of unlimited shrimp.
- The Powell Amendment was added to the By-Laws to include membership to individuals with licenses in states other than Virginia.



MEETING SPONSORSHIP OPPORTUNITIES

The Hampton Roads Estate Planning Council (HREPC) is an association of practicing certified public accountants, chartered life underwriters, attorneys, trust officers and non-profit professionals. HREPC extends this invitation with the following sponsorship opportunities for their 2017/2018 meetings.

Cocktail Hour Sponsor (\$600) includes:

- Signage with company name and logo displayed during cocktail hour
- Sponsorship acknowledgment during dinner event
- Opportunity to bring brochures/flyers to distribute to attendees
- Opportunity to network with attendees


Dinner Meeting Sponsor (\$900) includes:

- Signage displayed in meeting room and at registration desk
- Sponsorship acknowledgment and signage to be posted at dinner meeting
- Opportunity to bring brochures/flyers to distribute to attendees
- Opportunity to network with attendees and address the group
- Two (2) reservations for dinner meeting

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David Abbott, CFP®

Charles Schwab & Co., Inc.
4701 Virginia Beach Blvd. #200
Virginia Beach, VA 23462
P: 757-466-1293
F: 757-493-7650
E: david.abbott@schwab.com

R. John Bartley

U.S. Trust Private Wealth Management
999 Waterside Drive #800
Norfolk, VA 23510
P: 757-625-9851
F: 757-625-9874
E: john.bartley@ustrust.com

Susan C. Alper, ESQ

Wilks, Alper, Harwood & McIntyre P.C.
468 Viking Drive #200
Virginia Beach, VA 23452
P: 757-623-6500
F: 757-623-6508
E: salper@wahlaw.com

Mark S. Batzel, AEP®, CFBS, MSFS

Summit Group of Virginia
5029 Corporate Woods Dr. #180
Virginia Beach, VA 23462
P: 757-499-8300
F: 757-499-3915
E: mbatzel@summitgroupva.com

Scott N. Alperin, ESQ, AEP®

Alperin Law PLLC
500 Viking Drive #202
Virginia Beach, VA 23452
P: 757-490-3500
F: 757-233-3600
E: scott@alperinlaw.com

Gary Baum, CPA

Wall Einhorn & Chernitzer PC
150 West Main Street #1200
Norfolk, VA 23510
P: 757-213-1068
F: 757-213-8555
E: gbaum@wec-cpa.com

Shirley C. Baldwin, CPA, MBA, CFP®

Wall Einhorn & Chernitzer PC
150 West Main Street #1200
Norfolk, VA 23510
P: 757-625-4700
F: 757-213-8555
E: sbaldwin@wec-cpa.com

Rebecca L. Bell, CPA

Jones CPA Group, P.C.
749 Boush Street
Norfolk, VA 23510
P: 757-627-7672
F: 757-623-9740
E: rebecca@jonescpagroup.com

Claudia S. Bellars, CFP®
Merrill Lynch
208 Golden Oak Court #400
Virginia Beach, VA 23452
P: 757-631-5516
F: 757-315-8141
E: claudia_bellars@ml.com

Jane M. Bennett, AEP®, CLU®, LUTCF, CLTC
New York Life Insurance Co.
999 Waterside Drive #1500
Norfolk, VA 23510
P: 757-628-1880
F: 757-628-1875
E: janebennett@ft.newyorklife.com

Wendy Bookhout, CPA
Bookhout Consulting CPA's
616 Terrace Avenue
Virginia Beach, VA 23451
P: 757-288-7588
E: wbookhout@gmail.com

Jessica M. Booth, ESQ
Pender & Coward, P.C.
222 Central Park Avenue #400
Virginia Beach, VA 23462
P: 757-490-6269
F: 757-502-7387
E: jbooth@pendercoward.com

Allison Bough, MBA CFRE
SparkNonprofit, LLC
1407 Colonial Avenue
Norfolk, VA 23517
P: 757-581-0054
E: allison.bough@sparknonprofit.com

Leigh Anne Bowling, ESQ
Leigh Anne Bowling, JD,LLM, PC
1604 Hilltop West Executive Center #319
Virginia Beach, VA 23451
P: 757-227-5426
F: 757-227-5427
E: labowling@bowlinglawfirm.com

Brian A. Boys, ESQ
Atlantic Law PLC
5265 Providence Road #303
Virginia Beach, VA 23464
P: 757-636-4480
F: 757-610-9520
E: brian@atlanticlawplc.com

Thomas R. Brennaman, CLU®, ChFC®, CLTC
MassMutual Financial Group
222 Central Park Ave, #1100
Virginia Beach, VA 23462
P: 757-493-4376
F: 757-490-3542
E: tbrennaman@massmutualbrokerage.com

Neal P. Brodsky, AEP®, ESQ
LeClair Ryan, P.C.
999 Waterside Drive #2100
Norfolk, VA 23510
P: 757-441-8912
F: 757-441-8962
E: neal.brodsky@leclairryan.com

Nicole Brown-Griffin, AFC®, CFP®
Workplace Options
1434 Crossways Boulevard #150
Chesapeake, VA 23320
P: 757-523-8085
E: nicole.brown-griffin@workplaceoptions.com

John S. Burton, ESQ
JS Burton, PLC
575 Lynnhaven Pkwy. #301
Virginia Beach, VA 23452
P: 757-301-9500
F: 757-257-0347
E: john@jsburton.com

Susan Carriker
Children's Hospital of The King's Daughters
601 Children's Lane
Norfolk, VA 23507
P: 757-668-7423
F: 757-668-7350
E: susan.carriker@chkd.org

Leigh J. Cason, CTFA
AMG National Trust Bank
780 Lynnhaven Parkway #140
Virginia Beach, VA 23452
P: 757-368-4466
F: 757-368-2009
E: ljason@amgnational.com

Catherine A. Castle, CPA
Jacobson Brotman PC
984 First Colonial Road #305
Virginia Beach, VA 23454
P: 757-422-4445
F: 757-491-8431
E: ccastle@jwbcpcas.com

Vonda W. Chappell, ESQ
Kaufman & Canoles, P.C.
501 Independence Parkway #100
Chesapeake, VA 23320
P: 757-546-4150
F: 757-546-4120
E: vwchappell@kaufcan.com

Gino V. Colombara
Alzheimer's Association
South East Virginia Chapter
6350 Center Drive #102
Norfolk, VA 23502
P: 757-459-2405
F: 757-461-7902
E: gino.colombara@alz.org

Lisa L. Conrad, CTFA, CSA
Union Bank & Trust
582 Lynnhaven Parkway #301
Virginia Beach, VA 23452
P: 757-473-5850
F: 757-499-6936
E: lisa.conrad@bankatunion.com

J. Daniel Coogan, CLU®, MBA
Northwestern Mutual
277 Bendix Road #450
Virginia Beach, VA 23452
P: 757-314-4621
F: 757-622-4956
E: dan.coogan@nm.com

Jerome D. Crain, CPA
BDO USA, LLP
150 Boush Street #1100
Norfolk, VA 23510
P: 757-640-7200
F: 757-640-7297
E: jcrain@bdo.com

Douglas L. Cronkright, JD, AEP®, CLU®
Purpose Planning Group
870 N Military Highway #227
Norfolk, VA 23502
P: 757-455-9026
F: 866-543-1766
E: dougwright@aol.com

Richard L. Dail, CPA
Cherry Bekaert LLP
222 Central Park Avenue #1400
Virginia Beach, VA 23462
P: 757-456-2400
F: 757-456-2404
E: rdail@cbh.com

Douglas W. Davis, ESQ
Davis Law Group, P.C.
516 Baylor Court Suite B
Chesapeake, VA 23320
P: 757-420-7722
F: 757-420-8565
E: ddavis@davislawgrouppc.com

Todd Derby, CPA
DesRoches & Company, CPAs P.C.
Reflections II #200
Virginia Beach, VA 23452
P: 757-498-3000
F: 757-340-5447
E: todd@desrochescpas.com

Mark W. DesRoches, CPA
DesRoches & Company, CPAs P.C.
Reflections II #200
Virginia Beach, VA 23452
P: 757-498-3000
F: 757-340-5447
E: mark@desrochescpas.com

Cyrus A. Dolph IV, ESQ, AEP®
Clarke, Dolph, Rapaport, Hull & Brunick, PLC
5712 Cleveland Street #130
Virginia Beach, VA 23462
P: 757-466-0464
F: 757-466-0834
E: cdolph@clarkedolph.com

Allan G. Donn, ESQ
Willcox & Savage, PC
440 Monticello Avenue #2200
Norfolk, VA 23510
P: 757-628-5521
F: 757-628-5566
E: adonn@wilsav.com

William J. Dungan Jr., CLU®, CFP®
Dungan & Associates LLC
PO Box 68037
Virginia Beach, VA 23471
F: 757-621-2915
F: 757-561-2639
E: dungan@dunganandassociates.com

A. Thomas Dunn, CLU®
Friedman Associates
233 Business Park Drive #200
Virginia Beach, VA 23462
P: 757-420-9600
F: 757-213-7577
E: thomas@friedman-insurance.com

John C. Ellis Jr., CLU®
MassMutual Financial Partners
3330 Pacific Avenue #401
Virginia Beach, VA 23451
P: 757-491-3300
F: 757-491-6333
E: ellis@infionline.net



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Arthur Jones, CFA
Managing Principal

One Columbus Center, Suite 600
Virginia Beach, VA 23462

757.226.0010

ajones@swmsllc.com



www.swmsllc.com

Kristy Everett, CPA

Wall Einhorn & Chernitzer PC
150 West Main Street #1200
Norfolk, VA 23510
P: 757-625-4700
F: 757-625-0527
E: keverett@wec-cpa.com

Bruce R. Frieden, CLU®

The Frieden Agency
The 3300 Building, Suite 200
Virginia Beach, VA 23452
P: 757-340-9777
F: 757-463-4661
E: brucefrieden@friedenagency.com

N. Susan Gordon, AAMS®, CFP®

Union Bank & Trust
5425 Discovery Park Blvd #102
Williamsburg, VA 23118
P: 757-327-7510
F: 757-229-1658
E: susan.gordon@bankatunion.com

Melvin R. Green, CPA

P: 757-625-0262
E: greenmelvin23510@gmail.com

Nancy Hall, CPA, AEP®

Wall Einhorn & Chernitzer PC
150 West Main Street #1200
Norfolk, VA 23510
P: 757-533-4128
F: 757-213-8555
E: nhall@wec-cpa.com

Frances H. Hampton, ESQ, LL.M., CPA, CFP®

F. Hunter Hampton, P.C.
440 Monticello Avenue #1834
Norfolk, VA 23510
P: 757-497-3200
F: 757-955-8501
E: fhampton@fhhlaw.net

Roger L. Handy, CPA, PFS, CFP®

Roger L. Handy, P.C.
1064 Laskin Road #25C
Virginia Beach, VA 23451
P: 757-965-7501
F: 757-965-7503
E: rlhandy@rlhandycpa.com

Donald S. Hannahs, CFP®

Planning Solutions Group LLC
2247 W Great Neck Road #200
Virginia Beach, VA 23451
P: 757-271-8824
F: 757-496-6611
E: dhannahs@psgplanning.com

Steven J. Harwood, ESQ

Wilks, Alper, Harwood & McIntyre P.C.
468 Viking Drive #200
Virginia Beach, VA 23452
P: 757-623-6500
F: 757-623-6508
E: sharwood@wahlaw.com

Jessica A. Hayes, ESQ

Hook Law Center P.C.
295 Bendix Road #170
Virginia Beach, VA 23452
P: 757-399-7506
F: 757-397-1267
E: jhayes@hooklawcenter.com

Sally A. Haynes, CPA
Sally A. Haynes, CPA, PC
301 Bendix Road #460
Virginia Beach, VA 23452
P: 757-333-8515
F: 757-319-4143
E: sally@shaynescpa.hrcoxmail.com

Douglas R. Headley, CFP®, CTFA
3008 South Chase
Williamsburg, VA 23185
P: 757-903-8252
E: dougrayheadley@gmail.com

Sandra F. Hellstern, CLU®, LUTCF
New York Life Insurance Co.
870 N Military Highway #227
Norfolk, VA 23502
P: 757-455-9026
F: 757-455-9028
E: shellstern@ft.newyorklife.com

Bert Burr Henderson IV, CFP®
SunTrust Investment Services Inc.
150 W Main Street 14th Floor
Norfolk, VA 23510
P: 757-624-5696
F: 757-640-5841
E: burr.henderson@suntrust.com

Barbara M. Henley, CFRE
Old Dominion University
4417 Monarch Way #4113
Norfolk, VA 23529
P: 757-683-6563
F: 757-683-5221
E: bhenley@odu.edu

Patrick W. Herman, ESQ
Vandeventer Black LLP
101 West Main Street #500
Norfolk, VA 23510
P: 757-446-8621
F: 757-446-8670
E: pherman@vanblk.com

Andrew H. Hook, ESQ, AEP®, CELA, CFP®
Hook Law Center P.C.
295 Bendix Road #170
Virginia Beach, VA 23452
P: 757-399-7506
F: 757-397-1267
E: hook@hooklawcenter.com

Peter M. Huber, AEP®, ESQ
Willcox & Savage, PC
440 Monticello Avenue #2200
Norfolk, VA 23510
P: 757-628-5515
F: 757-628-5566
E: phuber@wilsav.com

D. Barry Iacono, CFP®, EA
D. Barry Iacono and Associates
5511 Princess Anne Road #102
Virginia Beach, VA 23462
P: 757-671-7000
F: 757-671-1013
E: biacono@barryiacono.com

Anthony B. Jernigan, CLU® ChFC, CEBS
Pinnacle Group
208 Golden Oak Court #121
Norfolk, VA 23452
P: 757-463-8000
F: 757-463-9290
E: ajernigan@pinnacle.ms

Christopher S. Johnson
Wells Fargo Bank, N.A.
440 Monticello Avenue #1100
Norfolk, VA 23510
P: 757-667-3521
F: 757-667-3539
E: chris.s.johnson@wellsfargo.com

E. Hough Johnson III, CLU®, ChFC®, CLTC
MassMutual Financial Group
222 Central Park Ave, #1100
Virginia Beach, VA 23462
P: 757-493-4367
F: 757-490-3542
E: info@houghjohnson.com

H. Alexander Johnson, ESQ, AEP®
Pender & Coward, P.C.
222 Central Park Avenue #400
Virginia Beach, VA 23462
P: 757-490-6254
F: 757-497-1914
E: ajohnson@pendercoward.com

Robert L. Johnson Jr., AEP®, CLU®, ChFC®
Rob Johnson & Associates
2685 Jackson Road
Suffolk, VA 23434
P: 757-934-6499
F: 757-934-6477
E: robpat@gte.net

Arthur Jones, CFA
Strategic Wealth Management Solutions, LLC
One Columbus Center #600
Virginia Beach, VA 23462
P: 757-226-0010
F: 757-222-1276
E: ajones@swmsllc.com

Edward S. Jones, AEP®, CPA, PFS, CFF®
Jones, Madden & Council, PLC
5029 Corporate Woods Dr. #190
Virginia Beach, VA 23462
P: 757-461-1040
F: 757-461-3670
E: ed@jonesmaddencouncil.com

Stephen M. Jones, CPA, ABV
Jones CPA Group, P.C.
749 Boush Street
Norfolk, VA 23510
P: 757-627-7672
F: 757-623-9740
E: steve@jonescpagroup.com

Eugene M. Jordan, II
Old Point Trust
11780 Jefferson Avenue
Newport News, VA 23606
P: 757-599-2205
F: 757-873-9365
E: gjordan@oldpointtrust.com

David Kamer, ESQ
Kaufman & Canoles, P.C.
150 W. Main Street #2100
Norfolk, VA 23510
P: 757-624-3175
F: 757-624-3169
E: dkamer@kaufcan.com

Scott Kaplan
Tidewater Jewish Foundation
5000 Corporate Woods Drive, #200
Virginia Beach, VA 23462
P: 757-965-6109
F: 757-965-6102
E: skaplan@ujft.org

Kirkland M. Kelley, AEP®, ESQ
Kaufman & Canoles, P.C.
150 W. Main Street #2100
Norfolk, VA 23510
P: 757-624-3283
F: 757-624-3169
E: kmkelley@kaufcan.com

Linda C. Landry, CFP®, AEP®, ChFC®
PNC Wealth Management
555 East Main Street 10th Floor
Norfolk, VA 23510
P: 757-625-9065
F: 757-625-2034
E: linda.landry@pnc.com

Stacy L. Long, AEP®, AIF, CFP®
NTrust Wealth Management
780 Lynnhaven Parkway #190
Virginia Beach, VA 23452
P: 757-301-8520
F: 757-301-3543
E: stacy@ntrustwm.com

Connie McKenzie, CFRE
EVMS
PO Box 1980
Norfolk, VA 23501
P: 757-965-8500
E: mckenzcl@evms.edu

Richard F. Kiefner Jr., AEP®, CLU®
Northwestern Mutual Life
300 E. Main Street, #1170
Norfolk, VA 23510
P: 757-961-6661
F: 757-961-6662
E: rick.kiefner@nm.com

Ann H. Larkin, ESQ
Midgett & Preti PC
2901 S. Lynnhaven Road #120
Virginia Beach, VA 23452
P: 757-687-8888
F: 757-687-8732
E: ann.larkin@mpapc.com

Vanessa Macias Stillman, ESQ
Midgett & Preti PC
2901 S. Lynnhaven Road #120
Virginia Beach, VA 23452
P: 757-687-8888
F: 757-687-8732
E: vanessa.stillman@mpapc.com

Laura A. McMahon, CPA
Dixon Hughes Goodman LLP
637 Green Valley Drive
Virginia Beach, VA 23462
P: 757-457-8434
F: 757-624-5233
E: laura.mcmahon@dhgllp.com

Patricia M. King
U.S. Trust Private Wealth Management
999 Waterside Drive #800
Norfolk, VA 23510
P: 757-625-9863
F: 757-625-9874
E: patricia.m.king@ustrust.com

Beth Ann R. Lawson, ESQ
Carrell Blanton Ferris & Associates PLC
780 Lynnhaven Parkway #330
Virginia Beach, VA 23452
P: 757-689-8668
F: 757-689-8670
E: blawson@carrellblanton.com

Burke W. Margulies, AEP®, ESQ
Pender & Coward, P.C.
222 Central Park Avenue #400
Virginia Beach, VA 23462
P: 757-490-6275
F: 757-497-1914
E: bmarguli@pendercoward.com

Paul Merritt, AIF, CRPC, MBA
NTrust Wealth Management
780 Lynnhaven Parkway #190
Virginia Beach, VA 23452
P: 757-301-8520
F: 757-301-3543
E: paul@ntrustwm.com

Repp H. Lambert II
Northwestern Mutual
277 Bendix Road #450
Virginia Beach, VA 23452
P: 757-314-4612
F: 757-622-4956
E: repp.lambert@nm.com

Robert B. Liberman, CLU®, LUTCF, AEP®
New York Life Insurance Company
5265 Providence Road #102
Virginia Beach, VA 23464
P: 757-456-9000
F: 757-495-4895
E: libermanr@ft.newyorklife.com

Hank Marriott
P: 757-635-0186
E: hankmarriott@outlook.com

John T. Midgett, JD, AEP®, ESQ
Midgett & Preti PC
2901 S. Lynnhaven Road #120
Virginia Beach, VA 23452
P: 757-687-8888
F: 757-687-8732
E: john.midgett@mpapc.com

Kenneth B. Lampert Jr., CLU®, ChFC®
MassMutual Financial Group
5900 E Virginia Beach Blvd. Janaf Tower #508
Norfolk, VA 23502
P: 757-621-0441
E: klampert@finsvcs.com

Stephan J. Lipskis, ESQ
TrustBuilders Law Group
804 Newtown Road #102
Virginia Beach, VA 23462
P: 757-645-0248
F: 757-275-7712
E: stephanlipskis@trustbuilders.com

Mavis McKenley, AEP®, CTFA
AMG National Trust Bank
780 Lynnhaven Parkway #140
Virginia Beach, VA 23452
P: 757-368-4466
F: 757-368-2009
E: memckenley@amgnational.com

Jennifer L. Moccia, ESQ
Rack & Moccia P.C.
222 Central Park Avenue #1920
Virginia Beach, VA 23452
P: 757-605-5000
F: 757-605-5020
E: jennifer.moccia@racklaw.com

Elena Montello
Hope House Foundation
801 Boush Street #302
Norfolk, VA 23510
P: 757-625-6161
F: 757-625-7775
E: emontello@hope-house.org

Randy Parrish, CPA
Tidewater Jewish Foundation
5000 Corporate Woods Dr. #200
Virginia Beach, VA 23462
P: 757-965-6104
F: 757-965-6102
E: rparrish@ujft.org

Henry T. Petersen, CPA, MSA
Jones CPA Group, P.C.
100 Constitution Drive #200
Virginia Beach, VA 23462
P: 757-631-4760
F: 757-631-4759
E: henry@jonescpagroup.com

Anita O. Poston, ESQ
Vandeventer Black LLP
101 West Main Street #500
Norfolk, VA 23510
P: 757-446-8606
F: 757-446-8670
E: aposton@vanblk.com

Cathy Ann Nadeau, CPA, AEP®
Jones CPA Group, P.C.
100 Constitution Drive #200
Virginia Beach, VA 23462
P: 757-631-4760
F: 757-631-4759
E: cathyann@jonescpagroup.com

Mark V. Pascucci, ESQ, AEP®, CPA, JP
Wolcott Rivers Gates
200 Bendix Rd, #300
Virginia Beach, VA 23452
P: 757-470-5553
F: 757-497-7267
E: pascucci@wolriv.com

Jane S. Phillips, CTFA
BB&T Wealth
500 E. Main Street, 2nd Floor
Norfolk, VA 23510
P: 757-823-7851
F: 757-823-7858
E: jsphillips@bbandt.com

Stephen K. Powell, ChFC®, RFC
Capital Financial Group
555 E Main Street #800
Norfolk, VA 23510
P: 757-461-2210
F: 888-533-5506
E: stephen.powell@capitalfinancialgrp.com

Richard E. Nottingham, CLU®, ChFC®, AEP®
Cape Financial, Inc.
4429 Bonney Road #440
Virginia Beach, VA 23462
P: 757-557-6902
F: 757-557-6903
E: dick@capefinancialinc.com

Elizabeth T. Patterson, CFP®
Waypoint Advisors
2101 Parks Avenue #800
Virginia Beach, VA 23451
P: 757-623-1600
F: 757-623-6144
E: bpatterson@waypointadvisors.net

Sidney E. Phillips, ChFC®, CLU®, CFP®, CRPS, AEP®
Dominion Financial Partners LLC
3505 Pasture Lane
Virginia Beach, VA 23453
P: 757-747-2931
F: 866-590-6062
E: sid@dominionfinancialpartners.com

Todd J. Preti, JD, AEP®, ESQ
Midgett & Preti PC
2901 S. Lynnhaven Road #120
Virginia Beach, VA 23452
P: 757-687-8888
F: 757-687-8732
E: todd.preti@mpapc.com

Nathan R. Olansen, JD, ESQ, CPA, LLM
Midgett & Preti PC
2901 S. Lynnhaven Road #120
Virginia Beach, VA 23452
P: 757-687-8888
F: 757-687-8732
E: nathan.olansen@mpapc.com

Paul T. Peele, AEP®, CPA, CLU®, ChFC®
New York Life Insurance Co.
999 Waterside Drive #1500
Norfolk, VA 23510
P: 757-333-4203
F: 757-333-4204
E: ptpeele@cox.net

Christine N. Piersall, ESQ
Williams Mullen P.C.
999 Waterside Drive #1700
Norfolk, VA 23510
P: 757-629-0703
F: 757-629-0660
E: cpiersall@williamsmullen.com

Ellis H. Pretlow, Esq
Kaufman & Canoles, P.C.
150 W Main Street #2100
Norfolk, VA 23510
P: 757-624-3249
F: 888-360-9092
E: ehpretlow@kaufcan.com

Caroline S. Oliver, CFA, CFP®, AEP®
Palladium Registered Investment Advisors
999 Waterside Drive, #1000
Norfolk, VA 23510
P: 757-305-1530
F: 757-305-1538
E: csoliver@palladiumllc.com

M. Powell Peters, AEP®, ESQ
Wolcott Rivers Gates
200 Bendix Rd, #300
Virginia Beach, VA 23452
P: 757-554-0241
F: 757-497-7267
E: peters@wolriv.com

Carl R. Pierson Jr., CFP®
Morgan Stanley Wealth Management
222 Central Park Avenue #1800
Virginia Beach, VA 23462
P: 757-493-2134
F: 866-766-4930
E: carl.r.pierson.jr@morganstanley.com

John S. Pugh, AEP®, CLU®, ChFC®, MSFS
The Zaugg Financial Group Inc.
4705 Columbus Street #302
Virginia Beach, VA 23462
P: 757-651-6561
F: 757-671-3332
E: johnpugh38@gmail.com

Shelloy K. Ranhorn, CPA
Wall, Einhorn & Chernitzer PC
150 W Main Street #1200
Norfolk, VA 23510
P: 757-625-4700
F: 757-625-0527
E: sranhorn@wec-cpa.com

Glen Robertson, ESQ
Wolcott Rivers Gates
200 Bendix Road #300
Virginia Beach, VA 23452
P: 757-554-0243
F: 757-497-7267
E: grobertson@wolriv.com

Jane R. Short, CFP®
Waypoint Advisors
2101 Parks Avenue #800
Virginia Beach, VA 23451
P: 757-623-1600
F: 757-623-6144
E: jshort@waypointadvisors.net

N. Gregory Spryn, CFP®
Old Point Trust
11780 Jefferson Avenue #D
Newport News, VA 23606
P: 757-722-5803
F: 757-873-9365
E: gspryn@oldpointtrust.com

Kevin B. Rack, ESQ, AEP®
Rack & Moccia P.C.
222 Central Park Avenue #1920
Virginia Beach, VA 23462
P: 757-605-5000
F: 757-605-5020
E: kevin.rack@racklaw.com

C. Arthur Robinson II, CPA, AEP®
Wolcott Rivers Gates
200 Bendix Road #300
Virginia Beach, VA 23452
P: 757-470-5551
F: 757-497-7267
E: arobinson@wolriv.com

Brett A. Smiley
Old Dominion University
4417 Monarch Way #4113
Norfolk, VA 23529
P: 757-683-6563
F: 757-683-5221
E: bsmiley@odu.edu

Edward A. Stein, AEP®
New York Life Insurance Co.
999 Waterside Drive #1500
Norfolk, VA 23510
P: 757-628-1836
F: 757-628-1875
E: eastein@ft.newyorklife.com

Rachel E. Radspinner, ESQ
Rack & Moccia P.C.
222 Central Park Avenue #1920
Virginia Beach, VA 23462
P: 757-605-5000
F: 757-605-5020
E: rachel.radspinner@racklaw.com

J. Howard Rodman Jr., CFP®
Morgan Stanley Wealth Management
222 Central Park Avenue #1800
Virginia Beach, VA 23462
P: 757-493-2115
F: 866-766-4930
E: howard.rodman@morganstanley.com

Barbara L. Smith, AEP®, CPA, CVA
Cherry Bekaert LLP
222 Central Park Avenue #1400
Virginia Beach, VA 23462
P: 757-456-2400
F: 757-456-2404
E: bsmith@cbh.com

W. Kevin Stewart, CPA, AEP®
Stewart & Company
613 N. Lynnhaven Road
Virginia Beach, VA 23452
P: 757-486-0114
F: 757-486-0921
E: kevin@stewartaccounting.com

Helen H. Reiter, CPA, AEP®
Reiter & Reiter PLLC
PO Box 3606
Norfolk, VA 23514
P: 434-476-2190
F: 434-476-2394
E: helen@reiter-reiter.com

Neil L. Rose, AEP®, ESQ
Willcox & Savage, P.C.
222 Central Park Avenue #1500
Virginia Beach, VA 23462
P: 757-628-5588
F: 757-628-5659
E: nrose@wilsav.com

Stephanie C. Smith, ESQ
Midgett & Preti PC
2901 S. Lynnhaven Road #120
Virginia Beach, VA 23452
P: 757-687-8888
F: 757-687-8732
E: stephanie.smith@mpapc.com

Kay A. Stine, CFRE
Hampton Roads Community Foundation
101 West Main Street #4500
Norfolk, VA 23510
P: 757-622-7951
F: 757-622-1751
E: kstine@hamptonroadscf.org

Bryan B. Rex, CFP®, ChFC®
Cornerstone Financial Services Inc.
2940 N Lynnhaven Road #100
Virginia Beach, VA 23452
P: 757-333-7377
F: 757-463-9855
E: brex@cfspro.com

Kitty Schaum
Virginia Beach Rescue Squad Foundation
740 Virginia Beach Boulevard
Virginia Beach, VA 23451
P: 757-437-0968
F: 757-437-0967
E: kschaum@vbrescuefoundation.org

Susan Speers Hume
UBS Financial Services
440 Monticello Ave 20th Floor
Norfolk, VA 23510
P: 757-624-3396
F: 855-585-9174
E: susan.hume@ubs.com

Edward R. Stolle, ESQ
Kaufman & Canoles, P.C.
2101 Parks Avenue #700
Virginia Beach, VA 23451
P: 757-491-4033
F: 888-360-9092
E: erstolle@kaufcan.com

Rod K. Sutherland

Rod K. Sutherland, Attorney at Law
 484 Viking Drive #120
 Virginia Beach, VA 23452
 P: 757-468-7777
 F: 757-468-7002
 E: rsutherland@rslaw.hrcxmail.com

Jeffrey T. Talbert, AEP®, ESQ

Shuttleworth, Ruloff, Swain, Haddad
 & Morecock P.C.
 317 30th Street
 Virginia Beach, VA 23451
 P: 757-671-6046
 F: 757-671-6004
 E: jtalbert@srgslaw.com

Marian B. Ticatch, CLU®, AEP®, LUTCF

Ticatch Financial Management
 Lincoln Financial Advisors
 One Columbus Center #800
 Virginia Beach, VA 23462
 P: 757-777-3120
 F: 757-490-9239
 E: marian.ticatch@lfg.com

Edward A. Tyng, AEP®, ChFC®, CLTC

MassMutual Financial Group
 222 Central Park Ave, #1100
 Virginia Beach, VA 23462
 P: 757-493-4347
 F: 757-490-3542
 E: etyng@financialguide.com

John T. Ure, JD, ESQ

Wall Einhorn & Chernitzer PC
 150 West Main Street #1200
 Norfolk, VA 23510
 P: 757-664-3466
 F: 757-213-1043
 E: jure@wec-cpa.com

John M. Wallace

MassMutual Financial Group
 222 Central Park Ave, #1100
 Virginia Beach, VA 23462
 P: 757-493-4343
 F: 757-490-3542
 E: johnmwallace@financialguide.com

Edith E. Weiss, CPA, ABV, PFS, CFF, MBA

Transcend Financial Strategies LLC
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 Virginia Beach, VA 23454
 P: 757-715-1664
 E: editheweisscpa@gmail.com

Caryn R. West, ESQ

AMG National Trust Bank
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 E: crwest@amgnational.com

Brian P. Winfield Sr., AEP®, CLU®

Winfield & Associates
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 F: 757-631-2162
 E: bpwinfield@winfieldins.com

John M. Woleben, AEP®, CLU®, ChFC®

Friedman Associates
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 F: 757-213-7577
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Nancy E. Woolsey, CPA

BDO USA, LLP
 150 Boush Street #1100
 Norfolk, VA 23510
 P: 757-640-7231
 F: 757-640-7297
 E: nwoolsey@bdo.com

Gary L. Zaugg, CFP®, ChFC®, CASL®, CDFA, AEP®

The Zaugg Financial Group Inc.
 4705 Columbus Street #302
 Virginia Beach, VA 23462
 P: 757-671-3331
 F: 757-671-3332
 E: gary.zaugg@raymondjames.com

David L. Zimmer, CPA, CFP®, MST

David L. Zimmer CPA PC
 One Columbus Center #600
 Virginia Beach, VA 23462
 P: 757-490-7824
 F: 757-490-7804
 E: dzimmercpa@aol.com

Alison R. Zizzo, ESQ

Midgett & Preti PC
 2901 S. Lynnhaven Road #120
 Virginia Beach, VA 23452
 P: 757-687-8888
 F: 757-687-8732
 E: alison.zizzo@mpapc.com

Norman J. Zwahlen, CPA

Jones CPA Group, P.C.
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THE WRG TRUSTS & ESTATES TEAM

Danielle N. Jarvis
(757) 687-3647
djarvis@wolriv.com

Mark V. Pascucci
(757) 470-5553
pascucci@wolriv.com

M. Powell Peters
(757) 554-0241
peters@wolriv.com

John W. Richardson
(757) 554-0252
richardson@wolriv.com

Glen M. Robertson
(757) 554-0243
grobertson@wolriv.com

C. Arthur Robinson, II
(757) 470-5551
arobinson@wolriv.com

Edward W. Wolcott, Jr.
(757) 554-0221
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(757) 428-6021

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Virginia Beach, VA 23452
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Stephanie C. Smith, Esquire
2901 S. Lynnhaven Road, Suite 120
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(757) 687-8888

Neil L. Rose, Esquire
222 Central Park Avenue, Suite 1500
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