



CENTRAL FLORIDA HEALTH ALLIANCE FOUNDATION

Attorney & Financial Advisor Referral Directory

This resource is provided as a courtesy by:
Don Grant, Planned Giving Officer
Central Florida Health Alliance Foundation
701 N. Palmetto Street, Suite F
Leesburg, Florida 34748

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Clermont

Kenneth "Wade" Boyette, Jr.

Boyette Law Offices, P.A.

1635 E. Highway 50, Suite 300 (3rd Floor)

Clermont, FL 34711

Email: wboyette@boyettelaw.net

(352) 394-2103 Phone

(352) 394-2105

Fees:

Simple will/one person	\$300
Reciprocal wills/husband & wife	\$500
Revocable Living Trust with Pour-over Wills for:	
Single person	\$850
Husband & wife jointly	\$1,200
Normal hourly rate	\$225.00

Comments: Has spent 12 years in estate/financial planning. Approximately 75% of practice is devoted to estate/financial planning.

George E. Hovis

Attorney-at-Law

235 Citrus Tower Blvd., Suite 101

Clermont, FL 34711

(352) 404-9600 Phone

(352) 404-9603 Fax

Fees:

Simple will/one person	\$200
Reciprocal wills/husband & wife	\$295
Revocable Living Trust with Pour-over Wills for:	
Single person	N/A
Husband & wife jointly	N/A
Normal hourly rate	N/A

Comments: Limited to wills only and also living wills for medical purposes. Real estate is primary focus.

Eustis

Ken Carpenter

United Southern Bank Trust Department

2701 S. Bay Street

Eustis, FL 32726

Email: ken.carpenter@unitedsouthernbank.com

(352) 483-5880 Phone

(352) 589-0422

Fees:

N/A

Brett L. Swigert, P.A.

Brett L. Swigert, Attorney at Law

P. O. Box 680

1231 County Road 452

Eustis, FL 32727

Email: BSwigertlaw@aol.com

(352) 357-0770 Phone

(352) 357-0818 Fax

Brett Swigert continued

Fees:	
Simple will/one person	\$150
Reciprocal wills/husband & wife	\$200
Revocable Living Trust with Pour-over Wills for:	
Single person	\$450 - 600
Husband & wife jointly	\$550 - 850
Normal hourly rate	250

Comments: Has 16+ years of experience in estate planning. Approximately 75% of practice involves estate planning. I would consider holding a small seminar at my Eustis, FL office for 10 – 14 participants but with two offices, I no longer have the time to assist otherwise.

Lady Lake

Jeffrey P. Skates, Attorney

McLin & Burnsed, PA
976 Del Mar Drive (352) 259-5011 Phone
Lady Lake, FL 32159 (352) 205-8413 Fax
Mailing address: P. O. Box 1299 The Villages, FL 32158-1299
Email: jeffs@mclinburnsed.com

Fees:	
Simple will/one person	\$500.00
(Includes durable power of attorney, health care surrogate and living will)	
Reciprocal wills/husband & wife	\$600.00
Revocable Living Trust with Pour-over Wills for:	
Single person	\$900.00
Husband & wife jointly	\$1,000.00
Normal hourly rate	\$225.00

Comments: Has 13 years in estate/financial planning and approximately 65% of practice is devoted to estate/financial planning.

Myra A. Tucker, CFP

Integrate Financial Services of Central Florida
304 La Grande Boulevard (352) 753-1161 Phone
Lady Lake, FL 32159 (352) 753-9633
Email: mtucker@gunnallen.com

Fees:	
Simple will/one person	\$250.00+
Reciprocal wills/husband & wife	\$350.00+
Revocable Living Trust with Pour-over Wills for:	
Single person	\$500.00+
Husband & wife jointly	\$1,000.00+
Normal hourly rate	\$175.00

Comments: Has 32 years in estate/financial planning and 100% of practice is devoted to estate/financial planning. Has an extensive financial, estate planning and tax planning background. Has been doing business in this area for over 25 years.

Ellen B. Wilcox, Graduate Estate Planning Consultant

Wealth Management Associates of America

5500 Citation Court

Lady Lake, FL 32159

Email: ellen@ellenwilcox.com

(352) 259-1547 Phone

(352) 259-1744 Fax

Website: www.ellenwilcox.com

Fees:

Simple will/one person	N/A
Reciprocal wills/husband & wife	N/A
Revocable Living Trust with Pour-over Wills for:	
Single person	N/A
Husband & wife jointly	N/A
Normal hourly rate	\$175.00

Comments: Certified Estate Planning Consultant and Registered Investment Advisor with 25 years experience in all areas of Financial Planning and Estate Planning. Licensed in both Securities and Insurance to facilitate all aspects of investments and charitable gifting.

Leesburg

Daniel M. Andrews

Andrews & Miller, CPA's

8543 U.S. Highway 441

Leesburg, FL 34788

Email: max@andrewsmiller.com

Website: andrewsmiller.com

(352) 326-8001 Phone

(352) 326-8011 Fax

Fees:

Simple will/one person	N/A
Reciprocal wills/husband & wife	N/A
Revocable Living Trust with Pour-over Wills for:	
Single person	N/A
Husband & wife jointly	N/A
Normal hourly rate	\$150

Comments: Has over 25 years experience in estate/financial planning. Approximately 10% of practice is devoted to estate/financial planning.

Vicki S. Bair

Haliday, Bair & Hux, CPA's, P.A.

400 Webster Street

Leesburg, FL 34731

Email: vickibair@embarqmail.com

(352) 787-3445 ext. 23 Phone

(352) 787-3493 Fax

Fees:

Simple will/one person	N/A
Reciprocal wills/husband & wife	N/A
Revocable Living Trust with Pour-over Wills for:	
Single person	N/A
Husband & wife jointly	N/A
Normal hourly rate	\$145

Comments: Estate tax planning, practice consists mostly of tax work.

Karen L. Bent, CTFA & Senior Vice President

St. Nicholas Private Asset Management, Inc.

2247 Citrus Blvd., #389

Leesburg, FL 34748

Email: bent@stnicholaspam.com

Website: www.stnicholasPAM.com

(352) 406-4751 Phone

(727) 214-2952 Fax

Fees:

N/A

Comments: Practice includes estate planning, wills, trusts, financial planning and estate tax planning. Has 29 years experience in Lake and Sumter counties. 100% of practice involves estate/financial planning.

William J. Binneveld

The First National Bank

310 Market Street

Leesburg, FL 34748

Email: Bill.Binn@fnbmd.com

(352) 315-8362 Phone

(352) 315-0209 Fax

Fees:

N/A

Comments: Have been involved in estate/financial planning for over 30 years. Lifelong resident of Leesburg, Past Board member Leesburg Regional Medical Center, Chairman for four (4) years.

J. Robert Duggan, Attorney, P.A.

207 W. Ninth Blvd.

Leesburg, FL 34748

Email: JRDPA208@aol.com

(352) 314-9255 Phone

(352) 314-0466 Fax

Fees:

Simple will/one person

N/A

Reciprocal wills/husband & wife

N/A

Revocable Living Trust with Pour-over Wills for:

 Single person

N/A

 Husband & wife jointly

N/A

Normal hourly rate

\$200

Comments: Provides estate planning, wills and trusts.

Alfred C. Haliday

Haliday, Bair & Hux, CPA's, P.A.

400 Webster Street

Leesburg, FL 34731

(352) 787-3445 ext. 23 Phone

(352) 787-3493 Fax

Fees:

Simple will/one person

N/A

Reciprocal wills/husband & wife

N/A

Revocable Living Trust with Pour-over Wills for:

 Single person

N/A

 Husband & wife jointly

N/A

Normal hourly rate

\$145

Comments: Estate tax planning, practice consists mostly of tax work.

Marshall H. Hux

Haliday, Bair & Hux, CPA's, P.A.
 400 Webster Street
 Leesburg, FL 34731

(352) 787-3445 ext. 23 Phone
 (352) 787-3493 Fax

Fees:	
Simple will/one person	N/A
Reciprocal wills/husband & wife	N/A
Revocable Living Trust with Pour-over Wills for:	
Single person	N/A
Husband & wife jointly	N/A
Normal hourly rate	\$145

Comments: Estate tax planning, practice consists mostly of tax work.

Mrs. Patricia Isaacson

Certified Financial Planner Practitioner
 Elite Financial Services
 414 W. Main Street, Suite 204
 Leesburg, FL 34748
 Email: patricia.isaacson@lpl.com

(352) 787-0300 Phone
 (352) 787-0390 Fax

Fees:	N/A
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Comments: Offers public service seminar programs for retirees and individuals nearing retirement. The program focuses on issues of critical interest such as reducing or deferring taxes, protecting retirement assets, maximizing retirement income potential and ensuring estates are distributed properly.

George Madden

SunTrust Bank
 900 N. 14th Street
 Leesburg, FL 34748

(352) 326-4531 Phone
 (352) 326-4623 Fax

Fees:	N/A
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Comments: SunTrust assists clients with a variety of estate planning, charitable giving and wealth management services.

Thomas A. Newman

1022 W. Ninth Blvd.
 Leesburg, FL 34748
 Email: tnewman@mscmail.bis

(352) 728-1122 Phone
 (352) 728-1217 Fax

Fees:	
Simple will/one person	N/A
Reciprocal wills/husband & wife	N/A
Revocable Living Trust with Pour-over Wills for:	
Single person	N/A
Husband & wife jointly	N/A
Normal hourly rate	\$200

Comments: Investments, financial and estate planning including providing benefits to employer.

P. Kim Silberstein

Financial Consultant
Elite Financial Services
414 W. Main Street, Suite 204
Leesburg, FL 34748

(352) 787-0300 Phone
(352) 787-0390 Fax

Fees: N/A

Comments: Offers clients a wide assortment of financial products and services including retirement planning, stocks, bonds, mutual funds, IRA's, annuities, life insurance and mortgages.

Stephen G. Sewell, Attorney

Sellar, Sewell, Russ, Saylor & Johnson, P.A.
907 Webster Street
P. O. Box 492722
Leesburg, FL 34749-2722
Email: ssewell@lsbg.net

(352) 787-2308 Phone
(352) 787-4341 Fax

Fees:
Simple will/one person \$150
Reciprocal wills/husband & wife \$225
Revocable Living Trust with Pour-over Wills for:
 Single person \$650
 Husband & wife jointly \$850
Normal hourly rate \$240

Comments: Has been involved in estate/financial planning for 30 years. Approximately 50% of practice is devoted to estate/financial planning.

Tim Sullivan

Prudential Financial
1521 Park Drive
Leesburg, FL 34748
Website: prudential.com
Email: Tim.Sullivan@prudential.com

(407) 903-9248 Ext. 7204 (Phone)
(407) 903-9518 (Fax)

Fees: N/A

Comments: Practice includes estate planning, wills, trusts, financial planning, and estate tax planning. Has been involved in estate/financial planning for 25 years.

Jeff Sustarsic

Edward Jones Investments
26540 Ace Avenue, Suite F104
Leesburg, FL 34748
Email: jeff.sustarsic@edwardjones.com

(352) 315-0977 Phone
(352) 315-0978 Fax

Fees: N/A

Comments: 8+ years in estate/financial planning. Approximately 30% of practice is devoted to estate/financial planning. I am always interested in helping LRMCA and the Foundation. If I can be of any assistance or clarify what we do, please let me know.

Larry E. Taylor, Attorney

L. E. Taylor, P.A.

P. O. Box 490208

Leesburg, FL 34749-0208

(352) 787-1440 Phone

(352) 365-6461

Fees:

Simple will/one person \$100 (presently)

Reciprocal wills/husband & wife \$200 (presently)

Revocable Living Trust with Pour-over Wills for:

Single person varies

Husband & wife jointly varies

Normal hourly rate \$250 (presently)

Comments: Has been involved in estate/financial planning 35 years. Approximately 20% of practice involves estate/financial planning. Due to standing commitments to several clients, would not be able to conduct seminars.

Tom Wiley

Wiley, Wiley & Associates, CPA's, PA

201 N. Second Street

Leesburg, FL 34748

Email: twiley@2wileycpas.comWebsite: www.2wileycpas.com

(352) 787-0852 Phone

(352) 787-0851

Fees:

N/A

Comments: Has over 20 years in estate/financial planning. Approximately 10% of practice is devoted to estate/financial planning.

Minneola**Edward P. Jordan, II, Attorney****Edward P. Jordan, II, PA**

604 N. Highway 27

Minneola, FL 34715

Email: edwardpjordan@cflrr.com

(352) 394-1000

(352) 394-2999

Fees:

Simple will/one person \$425.00

(Includes living will and durable power of attorney)

Reciprocal wills/husband & wife \$425.00

Revocable Living Trust with Pour-over Wills for:

Single person \$1,150.00

Husband & wife jointly \$1,150.00

Normal hourly rate \$315.00

Comments: Has 21 years in estate/financial planning. Approximately 20% of practice is devoted to estate/financial planning.

Mount Dora**William O. Boyd, Attorney**

William O. Boyd, P.A.

602 East Fifth Avenue

(352) 383-8123 Phone

William Boyd continued

Mount Dora, FL 32757 (352) 383-2517 Fax
Email: BBoyd@BoydEstateLaw.com
Website: BoydEstateLaw.com
Mail: P. O. Box 895 Mount Dora, FL 32756-0895

Fees:	
Simple will/one person	\$225
Reciprocal wills/husband & wife	\$325
Revocable Living Trust with Pour-over Wills for:	
Single person	\$1,500
Husband & wife jointly	\$2,250
Normal hourly rate	N/A

Comments: Also have offices in The Villages at The Oakland Hills Professional Center, 39401 N. U.S. Hwy. 441, The Villages, FL 32159

C. Edward Brooks, III

The First National Bank, Trust & Investments
P. O. Box 1406
Mount Dora, FL 32756 (352) 383-2140 Phone

Fees:	
Simple will/one person	N/A
Reciprocal wills/husband & wife	N/A
Revocable Living Trust with Pour-over Wills for:	
Single person	N/A
Husband & wife jointly	N/A
Normal hourly rate	-0-

Scott Gerken

Stone & Gerken, Attorney, P.A.
4850 N. Highway 19A (352) 357-0330 Phone
Mount Dora, FL 32757 (352) 357-2474 Fax

Fees:	
Simple will/one person	\$350
Reciprocal wills/husband & wife	\$500
Revocable Living Trust with Pour-over Wills for:	
Single person	\$750
Husband & wife jointly	\$750
Normal hourly rate	\$300

Comments: Happy to help.

Harry Thomas Hackney, Attorney

Harry Thomas Hackney, P.A.
3900 Lake Center Drive, Suite A1 (352) 735-6500 Phone
Mount Dora, FL 32757 (352) 735-6501 Fax

Fees:	
Simple will/one person	\$350

Harry Hackney continued

Reciprocal wills/husband & wife	\$650
Revocable Living Trust with Pour-over Wills for:	
Single person	\$800
Husband & wife jointly	\$1,000
Normal hourly rate	\$250

Comments: Also practices litigation and guardianships. He has an estate planning blog at www.harryhackney.com/blog.

John M. Jones, CTFA

First National Bank of Mount Dora

P. O. Box 1406

Mount Dora, FL 32756

(352) 383-2140 Phone

(352) 383-1219 Fax

Email: John.Jones@fnbmd.com Website: www.fnbmd.com

Fees: N/A

Comments: Have been involved in estate/financial planning for 20 years. Approximately 60% of practice is devoted to estate/financial planning. Has only worked in this area for approximately one (1) year.

Tavares

William (Bill) Cauthen, Attorney

Cauthen & Feldman, P.A.

215 N. Joanna Avenue

Tavares, FL 32778

(352) 343-2225 Phone

Fees:	
Simple will/one person	\$300 - 400
Reciprocal wills/husband & wife	\$300 - 400
Revocable Living Trust with Pour-over Wills for:	
Single person	\$900 – 1,100
Husband & wife jointly	\$900 – 1,200
Normal hourly rate	\$265

Comments: Fees may vary with the complexity of the estate.

H. John Feldman, Attorney

Cauthen & Feldman, P.A.

215 N. Joanna Avenue

Tavares, FL 32778

(352) 343-2225 Phone

Fees:	
Simple will/one person	\$300 - 400
Reciprocal wills/husband & wife	\$300 - 400
Revocable Living Trust with Pour-over Wills for:	
Single person	\$900 – 1,100
Husband & wife jointly	\$900 – 1,200
Normal hourly rate	\$265

Comments: Fees may vary with the complexity of the estate.

Thomas C. Hepner

Ruggie Wealth Management
 14229 U.S. Highway 441
 Tavares, FL 32778
 Website: ruggiewealth.com
 Email: thehpnr@ruggiewealth.com

(352) 343-2700 Phone
 (352) 742-2607 Fax

Fees: N/A

Comments: Has 10+ years experience in estate/financial planning. 100% of practice is devoted to estate/financial planning. Has assisted 10+ clients with estate plans to benefit the Foundation.

Thomas Ruggie, ChFC, CFP

Ruggie Wealth Management
 14229 U.S. Highway 441
 Tavares, FL 32778
 Website: ruggiewealth.com

(352) 343-2700 Phone
 (352) 742-2607 Fax

Fees: N/A

Comments: Have 17 years experience in estate/financial planning. 100% of practice is devoted to estate/financial planning.

The Villages**Citizens First Trust Company**

Rose M. Cruz Email: rose.cruz@citizensftc.com
 James E. Daley Email: jim.daley@citizensftc.com
 Gary W. Davis Email: gary.davis@citizensftc.com
 1060 Lake Sumter Landing
 The Villages, FL 32162
 Website: www.citizensftc.com

(352) 751-2199 Phone
 (352) 750-5096 Fax

Fees: N/A

Comments: Ms. Cruz has 20 years experience in estate/financial planning. Mr. Daley has 37 years experience in estate/financial planning. Mr. Davis has 32 years experience in estate/financial planning. 100% of their practice is devoted to estate/financial planning.

Frederick T. Goller, Attorney

1028 Lake Sumter Landing
 The Villages, FL 32162
 Email: fredg@mclinburnsed.com

(352) 259-5054 Phone
 (352) 751-4993

Fees:
 Simple will/one person \$500.00
 (Includes durable power of attorney, health care surrogate and living will)
 Reciprocal wills/husband & wife \$600.00
 Revocable Living Trust with Pour-over Wills for:
 Single person \$900.00
 Husband & wife jointly \$1,000.00

Frederick Goller continued

Normal hourly rate

\$200.00

Comments: Holds Masters in estate planning, has 3½ years experience in estate/financial planning and 95% of practice is devoted to estate/financial planning.