Calvary Professional Partners
Connecting Professional Resources to the Calvary Community

The mouth of the righteous utters wisdom, and his tongue speaks justice.
The Law of his God is in his heart, his steps do not slip.  Psalms 37:30-31

DISCLAIMER
“Calvary Professional Partners” is a resource from Calvary’s Business and Financial Ministries. Our goal is to assist in joining Calvary people with qualified and proven professionals who are recognized as being reputable and effective in his/her practice. Calvary Church is not a representative or agent of anyone in the Calvary Professional Partners listing. This relationship does not constitute an official relationship between the church and the listed professionals. Any Calvary member and/or others who use this resource do so solely by choice.
# Calvary Professional Partners Resource Guide

## Accounting Services
*Disclaimer - Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.*

<table>
<thead>
<tr>
<th>Contact</th>
<th>Service(s)</th>
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</table>
| Craig Bryson, Principal  
Christian Resource Management  
P.O. Box 2100, Orange, CA 92859  
4740 Green River Road, Suite 217  
Corona, CA 92880  
Phone: 951-273-1720  
Fax: 951-273-1649  
www.crmorange@aol.com | Provides behind-the-scenes Data Processing, Accounting, Receipt Processing, and other Miscellaneous Services, all designed to meet the particular needs of today’s small and medium size parachurch organization, non-profit Christian ministry, or other tax exempt organizations including individual income tax preparation. |

## Attorneys/Corporate Law
*Disclaimer - Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.*

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<tr>
<th>Contact</th>
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</table>
| Neil Pedersen  
Pedersen Law & Dispute Resolution Corporation  
17910 Skypark Circle, Suite 105  
Irvine, California 92614  
Phone: 949-260-1181  
Fax: 949-260-1185  
Email: npedersen@pedersenlaw.com  
www.pedersenlaw.com | Insurance Coverage, Bad Faith Litigation, Wrongful Termination and Discrimination Litigation, Business Litigation, Serious Personal Injury and General Counsel Services |

## Attorneys/Criminal Law
*Disclaimer - Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.*

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<thead>
<tr>
<th>Contact</th>
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| Bryan R. Kazarian  
The Law Offices of Bryan R. Kazarian  
4 Hutton Center Drive, Suite 660  
Santa Ana, CA 92705  
Phone: 714-975-5770  
Mobile: 714-336-5303  
Fax: 714-380-6325  
Email: brk@kazarianatlaw.com  
www.kazarianatlaw.com | Defense attorney for the following offenses: Driving, Drug, Theft, Fraud, Sexual, Violent, Juvenile, Federal |
## Attorneys/Immigration & Nationalization

**Disclaimer** - Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.

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<thead>
<tr>
<th>Contact</th>
<th>Service(s)</th>
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</table>
| Angie Navarro Sigala, Attorney at Law  
Law Offices of John R. Alcorn  
2212 Dupont Drive, Suite V  
Irvine, CA 92612  
Phone: 949-553-8529  
Facsimile: 949-553-8550  
Email: Angie@JR-Alcorn.com  
Certified Specialist attorney in Immigration & Nationality Law by the State Bar of California  
Board of Local Specialization |

## Attorneys/Wills & Living Trusts

**Disclaimer** - Listed professionals have been referred by either church members or other churches and are not an official endorsement by Calvary Church of Santa Ana.

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<tr>
<th>Contact</th>
<th>Service(s)</th>
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</table>
| David A. Brown, J.D.  
Brown and Streza LLP  
40 Pacifica - 15th Floor  
Irvine, CA 92618  
Phone: 949-453-2900  
| Kevin Fehrmann, Attorney  
16148 Sand Canyon Avenue  
Irvine, CA 92618  
Phone: 949-453-1010 | Wills, Trusts and Estate Planning, Conservatorship, Probate, Trust Administration, Tax Planning and Business Formations |
| Jeffrey R. Hartmann - Attorney at Law  
501 N. El Camino Real, Suite 200  
San Clemente, CA 92672  
| Dennis L. Watson  
Attorney at Law  
3 Douglass Drive, Coto de Caza, CA 92679  
Phone: 714-879-0664  
Cell: 714-936-3398  
Email: lawtrams@aol.com  
http://lawtrams.com | Wills, Trusts, Probate, Conservatorships, and Business Law |
Michael J. Wittick, Attorney  
Michael J Wittick, a Prof. Law Corp.  
7700 Irvine Center Drive  Suite 800  
Irvine, CA 92618-3047  
Phone: 949-858-5970  
Email: mwittick@witticklaw.com  
Values Based Planning, Estate and Trust Administration, Estate and Trust Litigation, Planning for affluent families, Business Entity and Succession Planning, and Asset Protection

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**Financial Planners**

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<tr>
<th>Contact</th>
<th>Service(s)</th>
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</table>
| Charles J. McLucas, Jr., CPA/PFS  
Charitable Trust Administrators, Inc.  
17501 East 17th St., Ste. 100  
Tustin, CA 92780  
Phone: 714-508-9100  
http://www.ctai-ca.com/ | Financial Investment and Retirement Planning |
| William C. O’Connor, CFP®, EA, ATA  
Applied Financial Planning, Inc.  
23101 Moulton Pkwy, Suite 110  
Laguna Hills, CA 92653  
Phone: 949-380-1210  
www.appliedfinancialplanning.com | Financial Investment and Retirement Planning |
| John T. Cooke, CFP  
Cooke Wealth Management, LLC  
4695 MacArthur Court, Suite 480  
Newport Beach, CA 92660  
Phone: 949-724-3880  
E-mail: john@cookewealthmgmt.com  
http://www.cookewealthmgmt.com | Financial Investment and Retirement Planning |
| Neil Paur, CFP®  
Ronald Blue & Co.  
1551 N. Tustin Ave., Suite 1000  
Santa Ana CA 92705  
Phone: 714-972-5904  
Fax: 714-543-1722  
Email: neil.paur@ronblue.com  
| James W. Regitz, Jr., ChFC  
Newport Advisory, LLC  
4695 MacArthur Ct., Ste. 480  
Newport Beach, CA 92660  
Phone: 949-622-9000  
http://www.newportadvisory.com/ | Financial Investment and Retirement Planning |
Notary

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<tr>
<th>Contact</th>
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<tbody>
<tr>
<td>Sandra Wychgel</td>
<td>Notarizes Acknowledgements, Jurats, Certified copy of Power of Attorney, Oaths and Affirmations. Pro bono services for personal documents of Calvary Church members.</td>
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</tbody>
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Additional Resources

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<tr>
<th>Contact</th>
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<tr>
<td>Kingdom Advisors</td>
<td>Primary mission is helping financial advisors integrate spiritual principles in their counsel to clients to further the Kingdom.</td>
</tr>
<tr>
<td>5605 Glenridge Dr., Suite 450</td>
<td></td>
</tr>
<tr>
<td>Atlanta, GA 30342</td>
<td></td>
</tr>
<tr>
<td>Phone: Main: 404-497-7680</td>
<td></td>
</tr>
<tr>
<td><a href="http://www.kingdomadvisors.org">http://www.kingdomadvisors.org</a></td>
<td></td>
</tr>
<tr>
<td>National Christian Foundation Southern California</td>
<td>Offers expert counsel and innovative, flexible giving solutions to help individuals, families, churches, ministries, and professional advisors make balanced godly giving decisions.</td>
</tr>
<tr>
<td>19742 MacArthur Blvd., Suite 230</td>
<td></td>
</tr>
<tr>
<td>Irvine, CA 92612</td>
<td></td>
</tr>
<tr>
<td>Phone: 949-263-0820, Fax: 949-553-8550</td>
<td></td>
</tr>
<tr>
<td><a href="http://southern">http://southern</a> california.nationalchristian.com/home</td>
<td></td>
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<tr>
<td>The Orchard Foundation</td>
<td>A fiduciary ministry offering a wide range of gift planning tools to individuals, families, and ministry organizations who desire to make the most of their God given resources to meet personal, family and charitable objectives.</td>
</tr>
<tr>
<td>8595 Explorer Drive</td>
<td></td>
</tr>
<tr>
<td>Colorado Springs CO 80920</td>
<td></td>
</tr>
<tr>
<td>Phone: 888-689-6300</td>
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<tr>
<td><a href="http://www.theorchard.org">www.theorchard.org</a></td>
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Credential Definitions

CFP Certified Financial Planner
The hallmark planning credential. Ensures that an advisor has taken planning-based classes and sat for a fairly rigorous two-day exam which has a 54% pass rate.

PFS Personal Financial Specialist
An add-on credential for CPAs who are also doing financial planning; it confers a working knowledge of the planning process.
CFA Chartered Financial Analyst
This hard-to-obtain designation takes at least 3 years and requires expertise in 10 areas of portfolio management and investment selections. Note: It does not require planning expertise.

CLU Chartered Life Underwriter
A certification sought by those who specialize in selling life insurance.

ChFC Chartered Financial Consultant
Generally sought by those with insurance backgrounds; requires a working knowledge of financial planning. CFP certificate is a prerequisite.

CPA Certified Public Accountant
A very rigorous 2 1/2 day exam. Designates technical accounting and tax competency, but not planning.

MSFP Masters in Financial Planning
A two-year masters program that requires academic prowess in planning, and investments as well as taxation.

CIMA Certified Investment Management Analyst
Top investment consulting designation taken at prestigious Wharton School of Business at the University of Pennsylvania

RIA Registered Investment Advisory
A firm registered with the SEC or State of Georgia to manage investments and/or change planning fees for services rendered.

CSA in I&NL Certified Specialist Attorney in Immigration & Nationality Law
A California attorney who is certified by the State Bar as an Immigration and Nationality Law specialist must have:
  • taken and passed a written examination in Immigration and Nationality Law
  • demonstrated a high level of experience in Immigration and Nationality Law
  • fulfilled ongoing education requirements
  • been favorably evaluated by other attorneys and judges familiar with her or his work.