Make-A-Wish®

THE NATIONAL DIRECTORY OF

Professional Advisors

I wish to blast off to Saturn in a red rocket ship

Zayden, 7
heart condition

The Directory

We would like to recognize and thank the following advisors who have established relationships within the Make-A-Wish network. Those listed have expertise in tax law, estate planning, accounting, wealth management and/or financial planning. These advisors share a common objective of helping clients achieve their philanthropic goals.

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SPECIALTY
Families with special needs children, life insurance trust, high net worth individuals

PROFESSIONAL RECOGNITION
Alabama Banker Association - 2016 Wayne Lambert Trust Professional of the Year; Alabama Banker Association President 2010-2011

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Generational estate planning, high net worth individuals and families, life insurance trusts, residence trusts

PROFESSIONAL RECOGNITION
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I wish to be a pop star

Kaylin, 8
gastrointestinal disorder

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Charitable strategies for donors, families, who wish to leave a legacy, married couples with no children, business owners

PROFESSIONAL RECOGNITION
Who's Who in Banking & Finance; Trusted Advisor-Wealth Management (Community Service Award)

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Financial planning for high and ultra-high net worth individuals and families

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> "Since his wish, I've noticed how much Haoran has grown up, and he looks up to the Marines a lot more now. Thank you from the bottom of our hearts for making his wish possible.
>
> HAORAN'S GRANDMOTHER

I wish to be a Marine

Haoran, 7
leukemia

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Wealth management programs and sophisticated investment alternatives for high net worth individuals, foundations, corporations, and not-for-profit organizations

PROFESSIONAL RECOGNITION
Recipient of the 2009 Jewish Adoption and Family Care Options Woman of the Year Award, 2010 ADL Community Service Award, the 2012 JCC Hanadiv President's Award, the 2013 JFNA National Endowment Achievement Award, the AJC 2013 Woman of Valor, and 2016 Mitzvah Society Honoree for the Jacobson Jewish Community Foundation for the Federation

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SPECIALTY
Handling cases for the injured and their families against the responsible parties. No advertising, just referral and word of mouth.

PROFESSIONAL RECOGNITION
"AV" rated by Martindale-Hubbell for the highest level of legal ability and ethics; Florida Legal Elite/Hall of Fame (Only 1.8% of Florida lawyers who exemplify a standard of excellence in their profession as chosen by their colleagues are selected as Florida Legal Elite. Compiled by *Florida Trend* magazine. Only 56 of 100,000+ Florida lawyers have been selected for the Hall of Fame).

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I wish to be a mermaid

Neva, 6
lymphoma

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High net worth individuals

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Assisting clients in passing their assets to family and charities in a tax-efficient manner consistent with their personal goals.

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BCG Valuations

SPECIALTY
Closely held, often family owned, business valuations throughout the country

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Wills, Trusts and Estates– from the simple to the complex and everything in between. Deep subject matter expertise in the law of wills, trusts and related tax matters.

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I wish to be a superhero

Michael, 6
respiratory condition

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Trust and estate litigation

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SPECIALTY
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- Risk management
- Estate planning strategies
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I wish to be a model

Camille, 18
leukemia

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