OPMH Planned Giving
Legal and Financial Planning Resources

If a member of the church seeks referral to a professional regarding wills and estate planning or financial planning, the Planned Giving Committee can provide a referral, and where appropriate and requested, make the introduction.

The following names and firms have been compiled by the Planned Giving Committee from OPMH member recommendations and from other associations with the church. If a member wishes to establish a professional relationship with one of the listed persons or firms, he or she should expect to be charged for the services rendered. Rates, fees and costs for such professional services will vary and will depend upon the scope and nature of services rendered.[1]

NO REPRESENTATION AS TO THE NECESSITY FOR OR THE QUALITY OF SERVICES RENDERED OR AS TO THE ACCURACY OF ADVICE PROVIDED BY ANY OF THE LISTED PROFESSIONALS IS MADE BY THE PLANNED GIVING COMMITTEE OR OLD PRESBYTERIAN MEETING HOUSE.

Legal and Estate Planning Resources:

The services a lawyer can provide range from drafting a will or an amendment to a will to more complex and sophisticated tax, trust and estate planning. The special needs of the giver or his or her family members, succession of a family business and other personal and family planning needs can be addressed through estate planning.

The following lawyers are prepared to meet with OPMH members to discuss their wills and estate planning needs.

1. **Alexander, Patience**
   Partner, Patience Ann Alexander, PC
   Licensed in: District of Columbia, Maryland, Virginia, West Virginia
   Referred by: Rob Dunn, Marjorie Lenn and Doug Siegler[2]
   Contact information: 707 Prince Street, Alexandria, VA 22314, 703-549-5203

2. **Harrison, Ellen K.**
   Partner, Pillsbury Winthrop Shaw Pitman, LLP
   Licensed in: District of Columbia, Maryland
   Referred by: Cas Hobbs
   Contact information: 2300 N Street, N.W., Washington, D.C. 20037, 202-663-8316, ellen.harrison@pillsburylaw.com.

[1] Professional services fees are highly dependent upon an individual's needs. Lawyer fees can be strictly hourly, with a wide range in the hourly rates (*e.g.*, $200 to $500 an hour), a flat or set fee for drafting a specific type of document, or a combination of hourly and flat fees. Financial planner fees are usually based upon a flat fee or a percentage of the transaction made or an account value; hourly fees occasionally may be used but are not as common. The professionals on this list are prepared to discuss fee arrangements and estimates with members during their initial consultation.

[2] Mr. Siegler is a partner at Sutherland Asbill & Brennan, LLP and has advised the church on planned giving matters.

3. **Laster, John L.**
Member, Law Offices of John L. Laster
Licensed in: District of Columbia, Maryland, Virginia
Referred by: Doug Siegler
Contact information: 103 Roswell Court, Falls Church, VA 22046, 703-538-3600, jll@trusttolast.com.

4. **Lonergan, Gary**
Member, Gary W. Lonergan, Ltd.
Licensed in: Virginia
Referred by: Rob Dunn
Contact information: 115 Oronoco Street, Alexandria, VA 22314, 703-836-3505

5. **Matthews, Deborah**
Member, Bartoli, Cain & Matthews PLLC
Licensed in: District of Columbia, Maryland, Virginia
Referred by: Mary Lee Anderson
Contact information: 908 King Street, Suite 350, Alexandria, Virginia 22314, 703-548-3577

6. **Redmon, Gant**
Managing partner, Redmon, Peyton, Braswell, LLP
Licensed in: District of Columbia, Illinois, Virginia
Referred by: Cas Hobbs
Contact information: 510 King Street, Suite 301, Alexandria, VA 22314, 703-684-2000

7. **Stogner, N. Carr**
Partner, N. Carr Stogner
Licensed in: Virginia
Referred by: Rob Dunn
Contact information: 510 King St., Suite 400, Alexandria, VA 22314, 703-548-2663, ncarrs@aol.com.

Financial Planning Resources:

Financial planners advise clients on how to grow and protect their investments and wealth. Typical services include management of accounts, advice as to particular investments, including tax-advantaged instruments, and overall future financial planning.

The following financial advisors are prepared to meet with OPMH members to discuss their financial planning needs.

1. **Holt, Chuck**
   OPMH member
   Senior Financial Advisor, Vice President, Merrill Lynch
   Referred by: Mary Lee Anderson
   Contact information: 1850 K Street, N.W., Suite 700, Washington, DC 20006, 202-659-5302, charles_holt@ml.com

2. **Mattison, Karl**
   The Presbyterian Foundation
   Referred by: Planned Giving Committee
   Contact information: 10410 Kensington Parkway, Kensington, MD 20895, 301-589-2919, kpm@fdn.pcusa.org

3. **McEachern, Mary**
   Former OPMH member
   Vice President, Wealth Management Advisor
   Portfolio Manager PIA Program
   Merrill Lynch
   Referred by: Mary Lee Anderson
   Contact information: 1850 K Street, N.W., Washington, DC 20006, 202-659-2951

4. **Wagner, Phylyp A., CPA, CFP**[3]
   Founder, Wagner Resource Group
   Referred by: Rusty Conner
   Contact information: 7601 Lewinsville Road, Suite 302, McLean, VA 21102, 703-883-0887, www.invest-taxfree.com

[3] Mr. Wagner primarily advises clients who have sophisticated financial planning needs.

<u>Additional Financial Planning Resources:</u>

1. **Edelman, Ric**
   Edelman Financial Services, LLC
   Referred by: Celebration steering committee members
   Contact information: 4000 Legato Road, 9th Floor, Fairfax, VA 22033,
   703-818-0800

2. **Trumbower Financial Advisors**
   Referred by: Celebration steering committee members
   Contact information: 4800 Montgomery Lane, Suite 875, Bethesda, MD 20814,
   301-215-8340

3. **General**: Many pension and retirement funds have advisors on staff who can provide advice to their members.

Please note: This list will be updated periodically, and any OPMH member who would like to recommend a lawyer or financial planner for inclusion on this list should send his or her name to the Planned Giving Committee.