



**ALLIANCE
HEALTHCARE
FOUNDATION**

Part of Central Florida Health Alliance

Attorney & Financial Advisor Referral Directory

This resource is provided as a courtesy by:
Ted E. Williams, CFRE, CFRM, Chief Executive Officer
Alliance Healthcare Foundation
1501 U.S. Hwy. 441, Building 1802
The Villages, FL 32159
(352) 751-8812

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Clermont

Wade Boyette

Boyette Law Offices, P.A.

1635 E. Highway 50, Suite 300 (3rd Floor)
Clermont, FL 34711

(352) 394-2103 Phone

(352) 394-2105

Email: wboyette@boyettelaw.net

Website: boyettelaw.net

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	\$275.00

Comments: Has spent 14 years in estate/financial planning. 75% of practice is devoted to estate/financial planning. Look forward to a beneficial relationship.

Eustis

Ken Carpenter

United Southern Bank Trust Department

2701 S. Bay Street

(352) 483-5880 Phone

Eustis, FL 32726

(352) 589-0422

Email: ken.carpenter@unitedsouthernbank.com

Comments: Assist with estate planning, wills and trusts in conjunction with local attorneys.

Brett L. Swigert, P.A.

Brett L. Swigert, Attorney at Law

P. O. Box 680

(352) 357-0770 Phone

1231 County Road 452

(352) 357-0818 Fax

Eustis, FL 32727

Email: BSwigertlaw@aol.com

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 17+ 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

1950 Laurel Manor Dr., Suite #140

(352) 259-5011 Phone

The Villages, FL 32158

(352) 205-8413 Fax

Mailing address: P. O. Box 1299, The Villages, FL 32158-1299

Email: jeffs@mclimburnsed.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	\$1,000.00
Husband & wife jointly	\$1,200.00
Normal hourly rate	\$300.00

Comments: Has 16 years in estate/financial planning and approximately 85% of practice is devoted to estate/financial planning.

Myra A. Tucker, CFP

Integrated 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

Wilcox Wealth Management

5500 Citation Court

(352) 259-1547 Phone

Lady Lake, FL 32159

(352) 259-1744 Fax

Email: ellen@ellenwilcox.com

Website: www.ellenwilcox.com

Fees:

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

Comments: A full-service financial advisor with 27 years experience helping clients preserve, protect and distribute wealth.

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	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 34748

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	N/A
Normal hourly rate	\$145

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

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

Comments: Involved in estate/financial planning for 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	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	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	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
1344 Griffin Road
Leesburg, FL 34748
Email: patricia.isaacson@lpl.com

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

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

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	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
 1344 Griffin Road
 Leesburg, FL 34748

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

Comments: Offers clients a wise 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@907webster.com

(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)

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

Comments: 8+ years in estate/financial planning. Approximately 30% of practice is devoted to estate/financial planning. I am always interested in helping LRMC 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.

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

Mount Dora, FL 32757

Email: BBoyd@BoydEstateLaw.com

Mail: P. O. Box 895 Mount Dora, FL 32756-0895

(352) 383-8123 Phone

(352) 383-2517 Fax

Website: BoydEstateLaw.com

Fees:

Simple will/one person	\$225 - 275
Reciprocal wills/husband & wife	\$325 - 375
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, Suite 903, 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	N/A
Normal hourly rate	-0-

Scott Gerken

Stone & Gerken, Attorney, P.A.

4850 N. Highway 19A

Mount Dora, FL 32757

(352) 357-0330 Phone

(352) 357-2474 Fax

Fees:

Simple will/one person	\$350
Reciprocal wills/husband & wife	\$450
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
Mount Dora, FL 32757

(352) 735-6500 Phone
(352) 735-6501 Fax

Fees:

Simple will/one person	\$350
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

United Southern Bank
2701 S. Bay Street
Eustis, FL 32726

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

Email: JohnF@CFLegal.com

(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	\$275

Comments: Fees may vary if complex planning involved. Always give an estimate of costs at time of meeting. 26+ years estate/financial planning, 80% devoted to estate/financial planning.

Thomas C. Hepner

Ruggie Wealth Management

2100 Lake Eustis Dr.

Tavares, FL 32778

Email: thehpnr@ruggiewealth.com

(352) 343-2700 Phone

(352) 742-2607 Fax

Website: ruggiewealth.com

Comments: Has 10+ years experience in estate/financial planning. 100% of practice is devoted to estate/financial planning.

Thomas Ruggie, ChFC, CFP

Ruggie Wealth Management

2100 Lake Eustis Dr.

Tavares, FL 32778

Email: truggie@ruggiewealth.com

(352) 343-2700 Phone

(352) 742-2607 Fax

Website: ruggiewealth.com

Comments: Have 18 years experience in estate/financial planning. 100% of practice is devoted to estate/financial planning.

The Villages

Frederick T. Goller, Attorney

1028 Lake Sumter Landing

The Villages, FL 32162

Email: fredg@mclinburnsed.com

(352) 259-5054 Phone

(352) 751-4993

Goller continued:

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	\$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.

Millhorn Law Firm

Kathryn Linn Email: Kathryn@millhorn.com
Eric C. Millhorn Email: eric@millhorn.com
Michael D. Millhorn Email: michael@millhorn.com
Ryan J. Millhorn Email: ryan@millhorn.com
Amy Reed Email; amy@millhorn.com

Website: www.millhorn.com

Palm Ridge Plaza
11938 County Road 101, Suite 110
The Villages, FL 32162

(352) 430-2557 Lake & Sumter
(352) 307-2221 Marion
(352) 750-8240 Fax

Fees:

Simple will/one person	\$200.00
Reciprocal wills/husband & wife	\$200.00 each
Revocable Living Trust with Pour-over Wills for:	
Single person	\$695.00
Husband & wife jointly	\$695.00
Normal hourly rate	\$150.00

Comments: Have 3 years in estate planning with 90% of practice devoted to estate planning. Consultations no charge.

Sabal Trust Company

Gary W. Davis Email: gdavis@sabaltrust.com
Rose M. Cruz Email: rcruz@sabaltrust.com
1060 Lake Sumter Landing
The Villages, FL 32162

Website: www.sabaltrust.com

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

Comments: Have 33 years in estate/financial planning. 100% of practice is devoted to estate/financial planning.