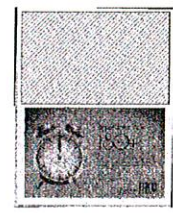


ESTATE PLANNING FIRMS

May 21, 2012 ■ Mississippi Business Journal ■ 17

Firm Address	Telephone Website	Year Founded Top Officer	Services
Allen Financial Group, P.A. 5828 Ridgewood Rd., Ste. #A, Jackson, MS 39211	(601) 956-6656 www.afgnetwork.net	1978 David B. Allen	Investments, retirement, education plans, life insurance, disability insurance, long-term care insurance, health insurance, property/casualty
AVL WealthCare, LLC 6450 Three Rivers Rd., Gulfport, MS 39503	(877) 859-4576 www.avlwealthcare.com	1989 Gerrisone Clark Weedin	Wealth management services — investment advisory and financial planning services, retirement, estate and education planning implementation, risk assessment and asset protection planning
Baker, Donelson, Bearman, Caldwell & Berkowitz 4268 I-55 N., Midwickbrook Office Park, Jackson, MS 39211	(601) 351-2400 www.bakerdonelson.com	1911 William S. Painter	Development and coordination of estate plans, drafting documents, probate of wills, prenuptial and post-nuptial agreements, beneficiary negotiation, post-mortem planning, IRS and petitioner representation
BancorpSouth Bank Asset Management & Trust 525 E. Capitol St., Jackson, MS 39201	(601) 354-4500 www.bancorpsouth.com	1970 Terry Mobley	Estate planning and administration, trust investments and administration, investments
Barnes Law Firm 5 River Bank Pl., Ste. A, Flowood, MS 39232	(601) 981-8336 www.barnes-lawfirm.com	1986 Harris H. "Trip" Barnes, III	Estate planning/probate, business planning, individual tax planning, estate litigation, mergers/acquisitions, tax problems
BKD, LLP 180 E. Capitol St., Ste. 500, Jackson, MS 39201-2190	(601) 948-6700 www.bkd.com	1922 Parker R. Johnson	Auditing, accounting, accounting, benefit plan consulting, estate planning, risk management, tax planning and compliance, litigation support
Blacksummit Financial Group Inc. 132 Riverview Dr., Ste. D, Flowood, MS 39232	(601) 714-1037 www.blacksummitfg.com	2009 Larry Peoples	Integrated wealth management, economic consulting
Brunini Grantham Grower & Hewes, PLLC The Pinnacle Building, Ste. 100, Jackson, MS 39201	(601) 948-3101 www.brunini.com	1981 Oranville Tate, Jr.	Estate Planning, Trusts & Estates, Probate
Butler, Snow, O'Mara, Stevens & Cannada, PLLC 1020 Highway 1100, Colony Pkwy., Ste. 1400, Hattiesburg, MS 39317	(601) 948-5711 www.butlersnow.com	1954 Donald Clark, Jr.	Legal, estate and retirement planning and probate. Business and litigation services for a broad spectrum of regional, national and international clients.
Copeland, Cook, Taylor & Bush, P.A. 1078 Highland Colony Pkwy., Ste. 100, Ridgeland, MS 39157	(601) 856-7200 www.cob.com	1965 Gard Copeland	Banking, bankruptcy, employee benefits, estate planning, family law, insurance, labor and employment, mergers and acquisitions and more.
Daniel Coker Horton & Bell, P.A. 4400 Ch. CA-10n Rd., Ste. 400, Jackson, MS 39211	(601) 969-7807 www.danielcoker.com	1945 Roy A. Smyth, Jr.	Estate planning, wills, trusts, partnership agreements, formations, contracts, general corporate
Erskine W. Wells Jr. 407 Fontaine Pl., Ste. 101, Jackson, MS 39206	(601) 957-7700 www.jcl.com/erskinewells	1961 Erskine W. Wells, Jr.	Investments, estate planning, retirement planning, long-term care insurance, wealth management
Eubank Betts Him Wood, PLLC 3820 I-55 N., Ste. 100, Jackson, MS 39211	(601) 987-4300 www.eubankbetts.com	1973 J. Frank Betts	Auditing and accounting, tax services, Quickbooks, consulting, business and personal advisory services for estate, gift and trust planning
Family Wealth Practices 2084 Old Taylor Rd., Ste. 107, Oxford, MS 39355	(662) 550-4443 www.familywealthpractices.com	2009 Mark C. Hornell	Family services, asset management, administrative services, tax services, wealth transfer



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Frasogna Courtney, PLLC 442 Old Canton Rd., Ste. 200, Jackson, MS 39211	(601) 987-3600 www.frasognacourtney.com	1976 Richard A. Courtney	Wills, revocable and irrevocable trusts, asset protection planning, powers of attorney, conservatorship, more
Fred Taylor & Associates 1280 E. Capitol Blvd., Ste. 8, Jackson, MS 39201	(601) 955-0011 www.fredtaylor.com	1960 FRED TAYLOR, M.D., M.P.H., F.A.C.P.	Wills, trusts, probate, estate planning, business succession, powers of attorney, conservatorship, more
Glover Russell, P.A. 129 N. Congress St., Ste. 600, Jackson, MS 39201	(601) 457-4379 www.glovermussell.com	2003 Glover Alton "Touse" Russell, Jr.	Estate planning, wills/trusts, probate, estates and inheritance, business/corporate law, litigation, retirement, health, employee benefits, tax planning, tax problems
Grubbsen-Poole CPAs 108 Highland Colony Plaza, Ste. 300, Ridgeland, MS 39157	(601) 455-0400 www.grubbsenpoole.com	1977 John Grubbsen	Individual and corporate tax, estate planning, business succession, probate, more
Haddox, Reid, Burke & Calhoun, PLLC 148 E. Capitol St., Ste. 500, Jackson, MS 39201	(601) 949-2924 www.hrcpa.com	1958 Paul Calhoun	Audit review, compilation, bookkeeping, payroll, tax planning/preparation, employee benefits, administration/consulting, litigation support/consulting for business, corporate, government and public jobs, estate, will and trust litigation
HORRE LLP 1320 Highland Colony Plaza, Ste. 400, Ridgeland, MS 39157	(601) 398-1000 www.horre.com	1965 Joe D. Horre, Jr.	Tax compliance, tax consulting and tax advisory, including state and local tax services, income, estate, gift and gift tax, estate planning services, tax sheltering, corporate taxation, tax planning, will and estate, probate, client, trust, corporate and financial services, accounting, construction and business litigation, retirement, estate, business succession, more
HORNE Wealth Advisors 1320 Highland Colony Plaza, Ste. 400, Ridgeland, MS 39157	(601) 326-1000 www.hornewealth.com	2009 Stan P. Putre	Personalized investment management, insurance, retirement, estate, business succession, charitable planning
The Trotter Agency, LLC 831 S. Main St., Greenwood, MS 39270	(601) 778-9050 www.trotter.com	1980 Bill S. Trotter	Personal and estate planning, wills, financial organization programs, life and health insurance, estate protection, retirement programs, education planning, more
Jones, Walker, Waechter, Poltevent, Carriere & Denegre L.L.P. 193 E. Capitol St., Ste. 600, Jackson, MS 39201	(601) 949-4500 www.joneswalker.com	1937 William H. Jones	Business succession planning, wills and trusts, advance healthcare directives and powers of attorney, family limited partnerships, labor and employment litigation, debtors and more
Klantz, Thibon & Bradstreet, LLC 404 Legacy Park Dr., Ste. A, Ridgeland, MS 39157	(601) 982-2088 www.kbtk.com	2005 William A. Klantz, III	Corporate and estate planning, health management
MAF Bank 1650 Highland Colony Parkway, Madison, MS 39110	(601) 665-5700 www.mafbank.com	1960 Ray E. Morgan, Hugh S. Potts, Jr.	Personal trust, corporate trust, employee benefits, IRA, qualified plan/retirement plans, probate estates asset management, fiduciary wealth management
May & Company, LLP 110 Mossburn Pl., Vicksburg, MS 39180	(601) 636-4782 www.maycpa.com	1922 John H. Park	Accounting and auditing, tax and financial planning and investment advisory services
Morgan White Group/MWG Senior Healthcare 5227 15th N., Jackson, MS 39211	(601) 556-2624 www.morganwhite.com	1988 David H. White	Medicare supplements, LTC, insurance, annuities, Part D plans, cancer treatment, dental/vision plans
Morton Law Firm, PLLC 132 Fernwood St., Ste. A, Clinton, MS 39056	(601) 828-9797 www.mortonlawfirm.com	1987 Ronald C. Morton	Estate planning and administration, Medicaid planning, elder law, special needs planning

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Pat Vivier Financial Group, LLC 1652 Highland Colony Pkwy, Ste. 101, Ridgeland, MS 39157	(601) 561-1633 www.patvivier.com	1982 Pat Vivier	Business planning, estate planning and investment management, life insurance, long-term care insurance
Philip Dunbar, LLP 4270 E. Hwy 90, Jackson, MS 39211-6331	(601) 352-2300 www.philipdunbar.com	1983 W. Thomas Blair, Jr.	Advisory, antitrust/trade regulation, appellate litigation, bankruptcy, bonded rights, business/banking, commercial litigation, construction, corporate restructurings, employee benefit/benefits, employment law, labor/union, intellectual property, insurance/underwriting, government contracts, healthcare and litigation, HIPAA compliance, immigration, franchise/development, intellectual property, international, insurance/brokerage, litigation/commercial, real estate, securities/brokerage, tax, estate planning, accounts and professional liability, public finance, national and state regulatory/governmental practice, tax, intellectual property, trademarks, white collar defense/criminal investigations
Pinnacle Trust Company 101 Post St., Ste. 200, Jackson, MS 39203	(601) 567-1023 www.pinnacletrust.com	1947 Stacy L. West	Professional asset management, estate and trust services, estate transfer planning, business planning, in-house Trust Company
Regions Morgan Keegan Trust 210 E. Capitol St., Jackson, MS 39201	(601) 564-8110 www.regions.com	1970 Jarvis Funder	Personal credit and finance
Renasant Bank 210 Hwy 51, Tupelo, MS 38804	(662) 660-1001 www.renasantbank.com	1974 E. Robinson McGraw	Banking/finance insurance
Security Bank Wealth Management 4300 E. Hwy 90, Ste. 21, Jackson, MS 39211	(601) 368-3500 www.sbcorp.com	1988 Brooks Mosley, Patrick W. McElroy	Estate planning, asset management, investment advisory and financial planning, business succession planning, plan administration
Shaw Powell, PLLC 2150 Lafayette Blvd., Ste. 101, Hattiesburg, MS 39402	(601) 326-1199 www.shawpowell.com	1999 Josh Powell, John Howard Snows	Estate planning, probate, estate litigation, divorce/family law, real estate, criminal defense, Social Security disability, litigation
Shas Simmons, LLP 209 N. Commerce St., Natchez, MS 39120	(601) 448-7411 www.shasimmons.com	1992 Charles W. Caldwell, Jr., Brandon M. Jones	Accounting services, audits, review and compilation, bookkeeping/finance, cash flow budgeting analysis, financial forecasting/projections, financial statements, accounting software selection/implementation, business consulting, business entity selection, business succession planning, business valuations, buying/selling a business, computer consulting, estate planning, financial planning, investment advice, franchise advisory services, partnership/sharing plans, retirement planning, estate/fraud law preparation, IRS representation, payroll services, sales tax services, tax services, litigation support, truck/trailer compliance/training

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Taylor, Powell, Wilson & Hartford, P.A. 1705 Hwy. 62 W., Greenwood, MS 38930-3069	(662) 453-6432 www.tpwih.com	1917 Robert R. Knight	Accounting, reviews/completions, tax services/preparation/planning, consulting services, financial planning, payroll services, audit, bookkeeping/write-up, IRS representation, estate planning, financial statements
Teller, Russell & Hopson, LLP 1201 Cherry St., Vicksburg, MS 39188	(601) 636-6565 www.tellerlaw.com	1856 Langston Teller, Jr.	Administrative law, admiralty, alternative dispute resolution, appellate practice, banking/consumer finance, large estates, commercial/business litigation, construction, corporate, education, estates/estate planning, family, general litigation, health care, insurance, labor/employment, medical malpractice, defenses, personal injury, product liability, probate, residential/commercial real estate, litigation, workers' comp, wrongful death
The William Morris Group, P.A. 188 E. Capitol St., Ste. 950, Jackson, MS 39201	(601) 948-0030 www.wmgroup.com	1981 Susan C. Hamson, William H. Morris, Jr., J. Longstreet Minor, III	Life insurance, disability income insurance, long-term care insurance, estate analysis, wealth accumulation/transfer strategies
Trustmark Wealth Management 248 E. Capitol St., Ste. 1000, Jackson, MS 39201	(601) 209-5134 www.trustmark.com	1949 Douglas H. Paskett	Personal trust, corporate trust, retirement planning, financial planning, estate planning, investment management, trust custody
Watkins & Eager, PLLC 400 E. Capitol St., Jackson, MS 39201	(601) 965-1900 www.watkins-eager.com	1905 M. Bradford Williams, Jr., Paul H. Stephenson, III	Wills, trusts, private foundations, probate, estate planning, tax planning, business planning, civil tax controversies
Wealth Transfer Planning Group, LLC 513 Colburne Dr., Ste. 5, Madison, MS 39110	(601) 963-9191	2005 Don Cooper	Comprehensive wealth transfer and other liquidity planning
WealthPartners, LLP 228 Trece Colony Park Dr., Ste. A, Hedgesland, MS 39157	(601) 414-4455 www.wealthpartnersllp.com	2005 John F. Hill	Investment/portfolio allocation strategies, retirement planning, long-term care, buy/sell analysis, financial independence, business succession, executive benefits, estate planning, estate tax reduction, generational transfers, charitable interests
Wells Harbale & Harst, PLLC 500 Concourse Blvd., Ste. 200, Ridgeland, MS 39157	(601) 605-0500 www.wells-harbale.com	1971 Kelly D. Simpkins	All aspects of estate planning and fiduciary administration, including handling of estate and trust litigation and disputes with the IRS
Wells Moore Simmons & Hubbard, PLLC 4450 Old Canton Rd., Ste. 200, Jackson, MS 39211	(601) 354-5400 www.wellsmoore.com	1982 A.M. Edwards, III	Estate planning, probate, wills/trusts, estate litigation
Williams, Pitts & Beard, PLLC 3042 McHenry Rd., Ste. A, Hattiesburg, MS 39332	(662) 429-4436 www.williamsandpitts.com	1983 Danny L. Williams	Tax services, payroll services, sales tax services, tax planning/preparation, IRS representation, licensee consulting, business valuations, more
Willford, McAllister & Jacobus, LLP 303 Highland Park Cove, Ste. A, Ridgeland, MS 39157	(800) 613-8765 www.willlaw.com	1991 Robert E. Willford	Estate planning, other legal services
Wise Carter Child & Caraway, P.A. 601 E. Capitol St., Ste. 600, Jackson, MS 39201	(601) 968-5500 www.wiscarter.com	1980 Douglas E. Levanway, Margaret H. Williams	Legal, estate and business planning and probate, taxation
YoungWilliams P.A. 210 E. Capitol St., Ste. 2000, Jackson, MS 39201	(601) 948-6100 www.youngwilliams.com	1963 James H. Noels, IV	Estate/tax planning, wills/trusts, litigation, corporate, securities, telecommunications, construction, estates, tax, collections, e-business, personal injury, divorce and alimony

Information for this list was provided by company representatives, the Estate Planning Council of Mississippi, and other reliable sources; companies are organized by city. The MBJ relies on survey respondents to be truthful and accurate in their representation of information listed. Listings are subjectively limited by space constraints and subject to change. Please direct questions and comments to Wally Northway at research@msbusiness.com.