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## **Estate Planning**

Firm	Telephone	Year Founded	Services
Address	Website	Top Officer	
Allen Financial Group, P.A.	(601) 956-6656	1978	Investments, retirement, education plans, life insurance, disability insurance, long-term care insurance, health insurance, property/casualty
5898 Ridgewood Rd., Ste. #A, Jackson, MS 39211	www.afgnetwork.net	David B. Allen	
AYL WealthCare, LLC	(877) 889-4976	1999	Wealth management services — Investment advisory and financial planning services; retirement; estate and education planning/implementation, risk assessment and asset protection planning
9490 Three Rivers Rd., Gulfport, MS 39503	www.avlwealthcare.com	Germaine Glani Weldon	
Baker, Donelson, Bearman, Caldwell & Berkowitz	(601) 351-2400	1911	Development and coordination of estate plans, draftling documents, probate of wills, prenuptial and post-nuptial agreements, beneficiary negotiation, post-mortem planning, IRS and petitioner representation
4268 I-55 N., Meadowbrook Office Park, Jackson, MS 39211	www.bakerdonelson.com	William S. Painter	
BancorpSouth Bank Asset Management & Trust	(601) 354-4500	1876	Estate planning and administration, trust investments and administration, investments
525 E. Capitol St., Jackson, MS 39201	www.bancorpsouth.com	Terry Mobley	
Barnes Law Firm	(601) 981-6336	1996	Estate planning/probate, business planning, individual tax planning, estate litigation, mergers/acquisitions, tax problems
5 River Bend PL, Ste. A, Flowood, MS 39232	www.barnes-lawfirm.com	Harris H. "Trip" Barnes, III	
BKD, LLP	(601) 948-6700	1922	Auditing, accounting outsourcing, benefit plan consulting, estate planning, risk management, tax planning and compliance, litigation support
190 E. Capitol St., Ste. 500, Jackson, MS 39201-2190	www.bkd.com	Peder R. Johnson	
Blacksummit Financial Group Inc.	(601) 714-1037	2009	Integrated wealth management, economic consulting
132 Riverview Dr., Ste. D, Flowood, MS 39232	www.blacksummitfg.com	Larry Peeples	
Brunini Grantham Grower & Hewes, PLLC	(601) 948-3101	1891	Estate Planning, Trusts & Estates, Probate
The Pinnacle Building, Ste. 100, Jackson, MS 39201	www.brunini.com	Granville Tate, Jr.	
Butler, Snow, O'Mara, Stevens & Cannada, PLLC	(601) 948-5711	1954	Legal, estate and retirement planning and probate. Business and litigation services for a broad spectrum of regional, national and international clients.
1020 Highland Colony Pkwy., Ste. 1400, Ridgeland, MS 39157	www.butlersnow.com	Donald Clark, Jr.	
Copeland, Cook, Taylor & Bush, P.A.	(601) 856-7200	1985	Banking, bankruptcy, employee benefits, estate planning, family law, insurance, labor and employment, mergers and acquisitions and more.
1076 Highland Colony Pkwy., Ste. 100, Ridgeland, MS 39157	www.cctb.com	Greg Copeland	
Daniel Coker Horton & Bell, P.A.	(601) 969-7607	1946	Estate planning, wills, trusts, partnership agreements, formations, contracts, general corporate
4400 Old Canton Rd., Ste. 400, Jackson, MS 39211	www.danielcoker.com	Roy A. Smith, Jr.	
Erskine W. Wells Jr.	(601) 957-7700	1981	Investments, estate planning, retirement planning, long-term care insurance, wealth management
407 Fontaine Pl., Ste. 101, Jackson, MS 39206	www.lpl.com/erskine.wells	Erskine W. Wells, Jr.	
Eubank Betts Hirn Wood, PLLC	(601) 987-4300	1970	Auditing & accounting; tax services; Quickbooks; consulting; business & personal advisory services for estate, gift & trust planning
3820 I-55 N., Ste. 100, Jackson, MS 39211	www.eubankbetts.com	J. Frank Betts	
Family Wealth Practices	(662) 550-4443	2008	Family services, asset management, administrative services, tax services, wealth transfer
2084 Old Taylor Rd., Ste. 107, Oxford, MS 38655	www.familywealthpractices.com	Mark C. Hartnett	
Frascogna Courtney, PLLC	(601) 987-3000	1978	Wills, revocable and irrevocable trusts, asset protection planning, powers of attorney, conservatorship, more
4400 Old Canton Rd., Ste. 220, Jackson, MS 39211	www.elderlawms.com	Richard A. Courtney	
Fred Salvo & Associates	(601) 956-9217	1982	Individual major medical, short-term major medical, group major medical, group life, group supplemental products, group long-term/short-term disability, group dental, voluntary life, voluntary disability, cancer, long-term care
1583 E. County Line Rd., Ste. B, Jackson, MS 39211	www.fredsalvo.com	Fred N. Salvo, Mickey Watkins	
Glover Russell, P.A. 120 N. Congress St., Ste. 600, Jackson, MS 39201	(888) 457-4379 www.gloverrussell.com	2003 Glover Alcorn "Russ" Russell, Jr.	Estate planning, wills/trusts, probate, estates and inheritance, business/ corporate law, litigation, retirement, health, employee benefits, tax planning, tax problems
GranthamPoole CPAs	(601) 499-2400	1977	Tax planning and preparation, auditing and accounting, employee benefits and plans, estate, trust, financial and retirement planning, business succession, asset protection
1062 Highland Colony Pkwy., Ste. 201, Ridgeland, MS 39157	www.granthampoole.com	J. Thomas Grantham, Jr.	
Haddox, Reid, Burkes & Calhoun, PLLC	(601) 948-2924	1958	Audit review, compilation, bookkeeping, payroll, tax planning/preparation, employee benefit, administration/consulting, litigation support/consulting for business, nonprofit, government and individuals, estate, gift and trust planning
188 E. Capitol St., Ste. 500, Jackson, MS 39201	www.hrbccpa.com	Paul Calhoun	
HORNE LLP	(601) 326-1000	1962	Construction; disaster recovery, financial institutions; franchise; health care; SEC registrants; large private companies; HORNE Wealth Advisors. Services tax compiliance; tax controllance; tax controllance; tax controllance; internal external exist; tax management, regulatory compiliance services; accounting outsourcing & business advisory, valuation, fraud, forensic & flitigation services.
1020 Highland Colony Pkwy., Ste. 400, Ridgeland, MS 39157	www.home-lip.com	Joe D. Havens, Jr.	
HORNE Wealth Advisors	(601) 326-1000	2009	Personalized investment management, insurance, retirement, estate, business succession, charitable planning
1020 Highland Colony Pkwy., Ste. 400, Ridgeland, MS 39157	www.hornewealth.com	Stan P. Purvis	
Ike Trotter Agency, LLC	(662) 378-9550	1980	Financial and estate planning services, financial organization programs, life and health insurance, income protection, retirement programs, education planning
831 S. Main St., Greenville, MS 38701	www.iketrotter.com	Ike S. Trotter	
Jones, Walker, Waechter, Poitevent, Carrère & Denègre L.L.P. 190 E. Capitol St., Ste. 800, Jackson, MS 39201	(601) 949-4900 www.joneswalker.com	1937 William H, Hines	Business succession planning, wills and trusts, advance healthcare directives and powers of attorney, family limited partnerships. Labor and employment; litigation defense and more.
Kientz, Tipton & Breazeale, LLC	(601) 982-2088	2005	Comprehensive estate planning, wealth management
404 Legacy Park Dr., Ste. A, Ridgeland, MS 39157	www.ktbilc.com	William A Kientz, III	
M&F Bank 1600 Highland Colony Pkwy., Madison, MS 39130	(601) 605-6700 www.mfbank.com	1890 Gary E. Morgan, Hugh S. Potts, Jr.	Personal trust, corporate trust, employee benefits, IRAs, guardianship/ conservatorship, probate estates asset management, fiduciary wealth management
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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.



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Butler, Snow, O'Mara, Stevens and Cannada

Firm	Telephone	Year Founded	Services
Address	Website	Top Officer	
May & Company, LLP	(601) 636-4762	1922	Accounting and auditing, tax and financial planning and investment advisory services
110 Monument Pl., Vicksburg, MS 39180	www.maycpa.com	John P. Paris	
Morgan White Group/MWG Senior Healthcare	(601) 956-2028	1988	Medicare supplements, LTC, life insurance, annuities, Part D plans, cancer insurance, dental/visions plans
5722 I-55 N., Jackson, MS 39211	www.morganwhite.com	David R. White	
Morton Law Firm, PLLC	(601) 925-9797	1997	Estate planning and administration, Medicaid planning, elder law, special needs planning
132 Fairmont St., Ste. A, Clinton, MS 39056	www.mortonelderlaw.com	Ronald C. Morton	
Pat Yivier Financial Group, LLC	(601) 601-1633	1982	Business planning, estate planning and investment management, life insurance, long-term care insurance
1052 Highland Colony Pkwy., Ste. 101, Ridgeland, MS 39157	www.patvivier.com	Pat Vivier	
<b>Phelps Dunbar, LLP</b>	(601) 352-2300	1853	Admiralty, antitrust/trade regulation, appellate litigation, bankruptoy/creditors' rights, business/finance, commercial litigation, construction, corporate/ securities, employee benefits/executive compensation, energy/tuffiles, environment, franchise/distribution, gaming, government contracts, health care and flitigation, hIPAA compliance, immigration, insurance/enisurance, intellectual property, international, labor/employment, legislative/governmental relations, oli/gas/energy/immirats, petroleum marketing, products and professional liability, public finance, railroad, real estate, regulatory/ governmental metates, tax, tort/toxic tort filigation, trusts/estates, white collar defense/regulatory/ investigations.
4270 I-55 N., Jackson, MS 39211-6391	www.phelpsdunbar.com	W. Thomas Siler, Jr.	
Pinnacle Trust Company	(601) 957-0323	1997	Professional asset management, estate and trust services, estate transfer planning, business planning, Independent Trust Company
101 Port St., Ste. 200, Madison, MS 39110	www.pinntrust.com	Stacey L. Wall	
Regions Morgan Keegan Trust	(601) 354-8110	1970	Personal trusts and estates
210 E. Capitol St., Jackson, MS 39201	www.regions.com	James Purdie	
Renasant Bank	(800) 680-1001	1904	Personal; business
209 Troy St., Tupelo, MS 38804	www.renasantbank.com	E. Robinson McGraw	
Security Ballew Wealth Management 4800 I-55 N., Ste. 21, Jackson, MS 39211	(601) 368-3500 www.sbcorp.com	1988 Brooks Mosley, Patrick W. McNulty	Estate planning, asset management, investment advisory and financial planning, business succession planning, plan administration
ShowsPowell, PLLC 2950 Layfair Dr., Ste. 101, Flowood, MS 39232	(601) 326-1199 www.showspowell.com	1999 Jon H. Powell, John Howard Shows	Estate planning, probate, estate litigation, divorce/family law, real estate, criminal defense, Social Security disability, litigation
Silas Simmons, LLP 209 N. Commerce St., Natchez, MS 39120	(601) 442-7411 www.silassimmons.com	1932 Charles W. Caldwell, Jr., Bennett M Jeansonne	Accounting services, audits, reviews and compilations, bookkeeping/write-up, cash flow/budgeting analysis, financial forecasts/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, inancial planning, investment review, management advisory services, pension/profit sharing plans, referrement planning, estate/trust tax preparation, list preparation, filter presentation, payroll services, sales tax services, tax services, litigation support, QuickBooks consulting/implementation.
Stockett & Thomas Agency, LLP 1020 Highland Colony Pkwy., Ste. 304, Ridgeland, MS 39157	(601) 948-3733	1939 Chad Stockett, Curt Thomas	Investments, group insurance, retirement plans, estate planning
Taylor, Powell, Wilson & Hartford, P.A.	(662) 453-6432	1917	Accounting, reviews/compilations, tax services/preparation/planning, consulting services, financial planning, payroll services, audit, bookkeeping/write-up, IRS representation, estate planning, financial statements
1705 Hwy. 82 W., Greenwood, MS 38930-9369	www.tpwh.com	Robert R. Knight	
Teller, Hassell & Hopson, LLP 1201 Cherry St., Vicksburg, MS 39183	(601) 636-6665 www.tellerlaw.com	1866 Landman Tellman, Jr.	Administrative law, admirally, alternative dispute resolution, appellate practice, banking consumer finance, large collections, commercial/business litigation, construction, corporate, education, estate/selsets iplanning, family, general litigation, health care, insurance, laboriemployment, medical malpractice deliens, personal injury, product liability, probate, residential/commercial real estate, listriusts, workers' comp, wonoful delation.
The William Morris Group, P.A. 188 E. Capitol St., Ste. 950, Jackson, MS 39201	(601) 948-0030 www.wmorrisgroup.com	1981 Susan C. Harrison, 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	(601) 208-5138	1949	Personal trust, corporate trust, retirement planning, financial planning, estate planning, investment management, trust custody
248 E. Capitol St., Ste. 1000, Jackson, MS 39201	www.trustmark.com	Douglas H. Raiston	
Watkins & Eager, PLLC 400 E. Capitol St., Jackson, MS 39201	(601) 965-1900 www.watkinseager.com	1895 M. Binford 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 Cobblestone Ct., Ste 6, Madison, MS 39110	(601) 953-9191	2005 Don Cooper	Comprehensive wealth transfer and cash liquidity planning
WealthPartners, LLP 220 Trace Colony Park Dr., Ste. A, Ridgeland, MS 39157	(601) 414-4455 www.wealthpartnersnfp.com	2005 John F. Hill	Investment/portfolio allocation strategies, retirement planning, long-term care, buysell analysis, financial independence, business succession, executive benefits, estate planning, estate tax reduction, generational transfers, charitable interests
Wells Marble & Hurst, PLLC	(601) 605-6900	1871	All aspects of estate planning and fiduciary administration, including handling of estate and trust litigation and disputes with the IRS
300 Concourse Blvd., Ste. 200, Ridgeland, MS 39157	www.wellsmarble.com	Kelly D. Simpkins	
Wells Moore Simmons & Hubbard, PLLC	(601) 354-5400	1982	Estate planning, probate, wills/trusts, estate litigation
4450 Old Canton Rd., Ste. 200, Jackson, MS 39211	www.wellsmoore.com	A.M. Edwards, III	
Williams, Pitts and Beard, PLLC	(662) 429-4436	1983	Tax services, payroll services, sales tax services, tax planning/preparation, IRS representation, business consulting, business valuations, more
2042 McIngvale Rd., Ste. A, Hernando, MS 38632	www.williamsandpitts.com	Danny L. Williams	
Williford, McAlister & Jacobus, LLP	(800) 613-8765	1991	Estate planning, other legal services
303 Highland Park Cove, Ste. A, Ridgeland, MS 39157	www.wmjlaw.com	Robert E. Williford	
Wise Carter Child & Caraway, P.A. 401 E. Capitol St., Ste. 600, Jackson, MS 39201	(601) 968-5500 www.wisecarter.com	1980 Douglas E. Levanway, Margaret H. Williams	Legal, estate and retirement planning and probate, taxation.
YoungWilliams P.A.	(601) 948-6100	1963	Estate/tax planning, wills/trusts, litigation. corporate, securities, telecommunications, construction, estates, tax, collections, agribusiness, personal injury, governmental relations
210 E. Capitol St., Ste. 2000, Jackson, MS 39201	www.youngwilliams.com	James H. Neeld, IV	

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