

TIMOTHY A. STEPHENSON

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PROFESSIONAL FIDUCIARY AND PROFESSIONAL GUARDIAN

This is a brief list of professional experiences that will assist in the performance of the functions of a Professional Fiduciary and Professional Guardian. Please call to discuss availability and services.

CERTIFICATIONS / EDUCATION / LICENSES

Florida State Professional Guardian registration – Since March 2015

I first served as a guardian in 2009 and determined in 2014 to become a Professional Guardian.

The American College of Financial Services, Bryn Mawr, Pennsylvania

Graduate study in financial services leading to the following certifications:

Chartered Financial Consultant (ChFC®)

Chartered Advisor in Senior Living (CASL®)

Chartered Life Underwriter (CLU®)

Certified Advisor in Philanthropy (CAP®)

Crown College, St. Bonifacius, Minnesota

Graduate Study in leadership

University of Kentucky, Lexington, Kentucky

Graduate study in the school of Journalism/Communications

Asbury Theological Seminary, Wilmore, Kentucky

Graduate study in theology, anthropology, communications, and organizational development

Fort Wayne Bible College, Fort Wayne, Indiana

Bachelor of Science (BS) in Theology and Pastoral Ministry

Student Council President

WORK EXPERIENCE

Owner and CEO of Southwest Florida Advocates: November 2014 to present

Southwest Florida Advocates provides the following services:

trustee or successor trustee

professional guardian

personal representative

bill pay services

curator

attorney-in-fact

consultations that may include: comprehensive financial planning, consultations about advance directives, long term care insurance, and counsel about senior living alternatives.

Executive Director of the Legacy Foundation at Shell Point, Inc.: October 2007 to November 2014

Location: Fort Myers, Florida

The Legacy Foundation is a not-for-profit subsidiary organization to the largest continuing care retirement community in the state of Florida.

Senior Vice President, Assistant to the President for Funding, and Regional Assistant Vice President for The Orchard Foundation: 1999 to October 2007

Location: Colorado Springs, Colorado

Planned giving specialist, major donor development

The Christian and Missionary Alliance, Inc.: 1995 to 1999

Location: Colorado Springs, Colorado

- Associate Director of Stewardship Ministries – Responsible for day-to-day operations of the Office of Stewardship for the denomination
- Director of Employee Benefits – Responsible for 2000 employees in 45 countries

Prudential Financial Services Insurance Sales and Investments: 1987 to 1995

Location: Lexington, Kentucky

- Commonwealth of Kentucky Leading Agent
- Ranked Top 20 nationally in mutual fund sales
- Special training in pensions and 401(k) plans

PROFESSIONAL MEMBERSHIPS / EXPERIENCE

Member, Professional Fiduciary Council of Florida

Member, Florida State Guardianship Association

Former member Board of Directors for Investors' Security Trust Company – November 2012—January 2015

Former member Advisory Board for Rego Manufacturing Company

Experience includes: Serving in the capacity of Trustee or Successor Trustee
 Serving in the capacity of Health Care Surrogate and Attorney-in-Fact
 Settlement of Estates
 Serving as Professional Guardian