

Planned Giving Council of Indian River Estate Planning Guide

ANIMALS

Dogs for Life

1230 16th Ave.
Vero Beach, FL 32960
Ms. Shelly Ferger
CEO
Phone: (772) 567-8969
Email: dogsforlifevb@bellsouth.net
Website: www.dogsforlifevb.org

Humane Society of Vero Beach

Mr. Chalmers Morse
Executive Director
Phone: (772) 228-9539
Email: cmorse@hsvb.org
Website: www.hsvb.org

ARTS

Gifford Youth Orchestra

Phone: (772) 778-5118
Email: xtalankh@aol.com
Website: www.gyotigers.org

Riverside Theater

3250 Riverside Park Drive
Vero Beach, FL 32963
Ms. Kate Gill
Director of Development
Phone: (772) 410-0481
Email: kateg@riversidetheatre.com
Website: www.riversidetheatre.com

Vero Beach Museum of Art

3001 Riverside Park Drive
Vero Beach, FL 32963
Ms. Kelly Williams
Major Gifts & Planned Giving Officer
Phone: 772-231-0707
Email: kwilliams@verobeachmuseum.org
Website: www.verobeachmuseum.org

CHILDREN

Big Brothers Big Sisters

403 N. US Hwy 1

Fort Pierce, FL 34950

Ms. Kim Lorimier

Philathropy Coordinator

Phone: (772) 466-8535 x213

Email: kim.lorimier@bbbsbig.org

Website: www.bbbsbig.org

Boys & Girls Clubs of Indian River County

1729 17th Avenue

Vero Beach, FL 32960

Mr. Phil Barnes

Phone: (772) 299-7449

Director of Resource Development

Email: philbarnes@bgcirc.org

Website: www.bgcirc.org

Children's Home Society

Phone: [\(772\) 925-9132](tel:(772)925-9132)

Email: elizabeth.logiodice@chsfl.org

Gifford Youth Achievement Center 4875 43rd Ave

Vero Beach, FL 32967

Ms. Margaret Gibbs

Director of Philanthropy

Phone: [\(772\) 794-1005](tel:(772)794-1005)

Email: pgibbs@gyac.net

Website: www.GYAC.net

Youth Guidance of Indian River

1028 20th Place

Vero Beach, FL 32960

Mr. Felix Cruz

Executive Director

Phone: (772) 492-3933

Email: fcruz@youthguidanceprogram.org

Website: www.youthguidanceprogram.org

EDUCATION

Education Foundation of Indian River, Inc.

PO Box 7046

Vero Beach, FL 32961

Ms. Cynthia Falardeau

Executive Director

Phone: (772) 564-0034

Email: director@edfoundationirc.org

Website: www.edfoundationirc.org

Literacy Services of Indian River County

1600 21st Street

Vero Beach, FL 32960

Ms. Jessica Schmitt

Executive Director

Phone: (772) 778-2223

Email: director@literacyservicesirc.org

Website: literacyservicesirc.org

Indian River State College Foundation

3209 Virginia Avenue

Fort Pierce, FL 34981

Ms. Monique Olson

Development Coordinator

Phone: (772) 462-7242

Email: mwalker@irsc.edu

Website: www.irscfoundation.org

ENVIRONMENT

Indian River Land Trust

80 Royal Palm Point, #301

Vero Beach, FL 32960

Ms. Ann Alleva Taylor

Dir. of Marketing & Philanthropy

Phone: (772) 794-0701

Email: ataylor@irlt.org

Website: www.irlt.org

HEALTHCARE

Alzheimer & Parkinson Association of Indian River County, Inc.

2300 5th Avenue, Suite 150
Vero Beach, FL 32960

Ms. Judith Lemoncelli

Phone: 772-536-0505

judyl@alzpark.org

Website: www.alzpark.org

American Cancer Society

321 Clearwater Park Road
West Palm Beach, FL 33401

Ms. Emily Karr

Director of Estate and Gift Planning

Phone: (561) 650-0127

Email: emily.karr@cancer.org

Website: www.cancer.org

Cleveland Clinic Foundation, Indian River County

1000 37th Place, Suite 101
Vero Beach, FL 32960

Ms. Patti Rooney

Finance Officer

Phone: (772) 226-4954

Email: patti.rooney@irmc.cc

Website: www.irhf.org

Cleveland Clinic Foundation, Indian River County

1000 - 36th Street
Vero Beach, FL 32960

Ms. Beverly Sanders

Director of Gift Planning

Phone: (772) 226-4951

Email: bev.sanders@irmc.cc

Website: www.irmc.cc

**Mental Health Association
in Indian River County, Inc.**

820 37th Place
Vero Beach, FL 32960

Ms. Mary Silva

Fund Development Manager

Phone: (772) 569-9788

Website: www.mhairc.org

Treasure Coast Community Health, Inc.

1555 Indian River Blvd. Suite B-210
Vero Beach, FL 32960

Mr. Dennis Bartholomew

Director of Bus. Development

Phone: (772) 913-5644

Email: dbartholomew@tcchinc.org

Website: www.tcchinc.org

VNA & Hospice Foundation

1110 35th Lane
Vero Beach, FL 32960

Ms. Carol Kanarek

Chairman of the Board

Phone: (772) 453-3599

Email: kanarekc@aol.com

Website: www.vnatc.com

VNA & Hospice Foundation

1110 35th Lane
Vero Beach, FL 32960

Ms. Pat Knipper

Major/PG Officer

Phone: (772) 978-5574

Email: pknipper@vnatc.com

Website: www.nvnatc.com

VNA & Hospice Foundation

1110 - 35th Lane
Vero Beach, FL 32960

Ms. Ann Marie McCrystal
Founder & Board Member
Phone: (772) 231-5813
Email: ammccrystal@yahoo.com
Website: www.vnatc.com

DOMESTIC ABUSE

SafeSpace, Inc.

P.O. Box 2922
Vero Beach, FL 34961

Mr. Tom Manwaring

Development Associate
Phone: (772) 341-6395
Email: tmanwaring@safespacefl.org
Website: www.safespacefl.org

SENIOR SERVICES

Senior Resource Association

Phone: (772) 469-2060
Email: mpeters@sramail.org
Website: www.seniorresourceassociation.org

St. Francis Manor

1750 20th Street
Vero Beach, FL 32960

Ms. Katie Kowanic

Interim Executive Director
Phone: (772) 480-0651
Email: katie@stfrancismanor.org
Website: www.stfrancismanor.org

NONPROFIT & COMMUNITY SERVICES

United Way Foundation

1836 14th Ave.
Vero Beach, FL 32960

Ms. Elizabeth Ullian

Executive Director
Phone: (772) 569-6777

Email: elizabeth.ullian@unitedwayirc.org

Website: www.unitedwayirc.org

RELIGIOUS

Community Church of Vero Beach

Phone: [\(772\) 469-2330](tel:(772)469-2330)

Email: shawna.stout@ccovb.com

Website: www.ccovb.org

ACCOUNTANTS

Offutt Barton Schlitt, CPAs

3003 Cardinal Drive, Suite C

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Ms. Kathryn Barton

CPA - Partner

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Website: www.cpaverobeach.com

Kmetz, Nuttall, Elwell, Graham, PLLC

2800 Ocean Drive

Vero Beach, FL 32963

Mr. Michael Kmetz

Certified Public Accountant

Phone: (772) 231-6902

Email: mkmetz@knegcpa.com

Website: www.knegcpa.com U.S.

FINANCIAL ADVISORS

Nat'l Bank of Commerce

2145A Indian River Blvd.

Vero Beach, FL 32960

Mr. Greg Brown Senior VP

Phone: (772) 774-7961

Email: gbrown@nationalbankofcommerce.com

Website www.nationalbankofcommerce.com

Cypress Trust Company

4625 N. A1A, Ste 2
Vero Beach, FL 32963

Ms. Anita Calabro

Vice President & Trust Officer

Phone: (772) 492-1919

Email: Anita.Calabro@cypresstrust.com

Website: www.cypresscapitalgroup.com

Cypress Trust Company

4625 N. A1A, Suite 2
Vero Beach, FL 32963
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Ms. Dee Giannotti

Vice President & Investment Officer

Email: dee.giannotti@cypresstrust.com

Website: www.cypresstrust.com

Estate Planning Advisors, Inc.

1717 Indian River Blvd., Suite 301
Vero Beach, FL 32960

Mr. Todd Heckman

President

Phone: (772)567-7970

Email: Todd@LRplans.com

Website: www.liferesourceplanners.com

Fidelity Investments

3340 Cardinal Drive
Vero Beach, FL 32963

Mr. Jim Davis

Vice President, Wealth Planner

Phone: (772) 453-2199, x58303

Email: Jimdavis.team@fidelity.com

Website: www.fidelity.com

Planned Giving Consultant to Charities

Planned Giving Sustaining Charities
859 Ridge Lake Dr.
Melbourne, FL 32940

Mr. Richard Johnson

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PNC

3001 Ocean Drive
Vero Beach, FL 32963
Ms. Sally Fusco
VP Relationship Strategist
Phone: (772) 231-3850
Email: sally.fusco@pnc.com

PNC Wealth Management

3001 Ocean Dr. Ste 301
Vero Beach, FL 32963
Phone: (772) 231-5308
Ms. Tracey Sorzano
Senior Vice President, Wealth Director
Phone: (772) 231-5308
Email: tracey.sorzano@pnc.com

U.S. Trust/Merrill Edge

625 - 34th Avenue, SW
Vero Beach, FL 32968
Mr. David Osgood
Senior Vice President
Phone: (772) 321-7513
Email: dosgoodvero@gmail.com
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LEGAL

Charles H. Sanford Law Offices, PL

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Law Office of Glenn Grevengoed

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