

Lisa McCurdy, Esq.
Managing Partner, The Wealth Counselor LLC

Ms. McCurdy counsels clients to **gain peace of mind** on all aspects of estate planning - wills, trusts, durable powers of attorney, asset-protection, business legacy and succession strategies, planned giving, guardianship and the preservation of government benefits for the elderly and disabled. Her clients are business owners, individuals who have acquired substantial assets, and aggressive investors – clientele whose focus on asset-protection, wealth-building and securing the maximum amount of their assets for generations to come, requires multidimensional estate-planning techniques. To further assist clients as they build and protect their wealth, Ms. McCurdy offers a “one-stop-shop” concept for all of her client’s estate-planning needs through a network of partnerships across disciplines such as insurance, financial management, accounting and tax planning.

Ms. McCurdy is passionate about assisting her clients in preserving their wealth to support their families for generations into the future. Personal, family experience has shown her the affects of not planning for incapacity and not establishing a plan for distributing assets at death. She has served as guardian, trustee, and attorney-in-fact for clients and family alike, protecting their assets and preserving their legacy for generations to come.

Ms. McCurdy is a graduate of the Georgetown University Law Center and the University of the District of Columbia. While at Georgetown University Law Center (GULC), Ms. McCurdy edited articles submitted by law professors and practicing tax counsel in her position as Lead Articles Editor of *The Tax Lawyer*, a collaboration between GULC and the American Bar Association. Ms. McCurdy is also a published author, having written Note, Distributive Share Deductions of Partnership Losses and Deductions Under Section 465: American Principles Leasing Corp. v. United States, 44 Tax Lawyer 943 (Spring 1991), which was reprinted by KPMG Peat Marwick for its in-house education program.

Ms. McCurdy is a member of the bars of the District of Columbia and New Jersey, as well as the American Bar Association, Women's Bar Association, District of Columbia Chamber of Commerce, The Marathon Club, the City Club of Washington, Club Corp USA and the Capital Society. Ms. McCurdy also serves on the young collectors’ board of The Phillips Collection.

Stacey Gaulding, JD, LLM
Associate, The Wealth Counselor LLC

Ms. Gaulding maintains a diverse, broadly-based estate planning, asset protection and probate practice. She has the ability to design and implement traditional or more sophisticated estate planning and asset protection strategies depending on what the situations warrant. She works with individuals, business owners, families and organizations at every stage of the estate planning process, including preparation and implementation of wills, advance directives, revocable and irrevocable trusts, disability documents, marital property agreements, estate management, as well as beneficiary designations necessary to coordinate a client’s life insurance and retirement assets with his or her overall plan. From personal experience, Ms. Gaulding has gained a wide knowledge of using alternative structures for the ownership of business and investment property, with particular emphasis on the use of partnerships, limited liability companies and other pass-through entities such as trusts and family limited partnerships.

Ms. Gaulding is admitted to practice in the District of Columbia and the State of Texas. She also participates in the Northern Virginia Estate Planning Council, American Bar Association (Real Property, Probate and Trust Law Section; Taxation Section), Phi Alpha Delta and was the Articles and Comments Editor for the Tax Law Chronicle at the University of Miami School of Law. Ms. Gaulding is a member of the Junior League of Washington and volunteers at The Women’s Center in Vienna, Virginia. She received her LL.M., in Taxation from the University of Miami School of Law in Coral Gables, Florida, her J.D. from St. Mary’s University School of Law in San Antonio, Texas and her B.S. from Virginia Commonwealth University in Richmond, Virginia.