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ESTATE & WEALTH PLANNING

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Chelli C. McCurdy, CTFA

SENIOR PARALEGAL

Chelli (pronounced "Kelli") McCurdy, CTFA has over 25 years of experience as a paralegal and over nine years working with mid-sized Trust Companies as a Trust Officer. In her current role as a Senior Paralegal with MGD, Chelli has a specific focus on Special Needs Trusts and, in addition, assists clients and attorneys with tax returns, pre-and post-death trust administration and corporate law issues.

Prior to starting with MGD Law, Chelli worked as a Trust Officer with Commerce Trust Company for three years with an emphasis in Special Needs Trust. Prior to Commerce Trust, Chelli was a Trust Officer at Edward Jones Trust Company for six years where her primary focus was on post-death administration. While at Edward Jones Trust Company, she earned her Certified Trust and Financial Advisor (CTFA) designation from the American Bankers Association and keeps her designation current with continuing education. Before becoming a Trust Officer, Chelli worked as a paralegal for a number of small estate planning law firms in St. Louis and a boutique litigation law firm in Irvine, California.

PRACTICE AREAS

Chelli assists MGD Law attorneys in the following practice areas:

- Estate & Wealth Planning
- Trust and Estate Administration
- Post Death Administration
- Special Needs Trust Administration

EDUCATION

- **University of Missouri/St. Louis concurrent with Pierre Laclede Honors Program** B.S. SUMMA CUM LAUDE (2006)
- **UMSL Writing Certificate** 2006
- **Coastline Community College, AA/Paralegal Certificate** 1993