REID & RIEGE ATTORNEYS

Kelly A. de Haas, CTFA

SENIOR TRUST ADMINISTRATOR

(860) 240-1039
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Practice Areas

Trust & Wealth Management

Education

Central Connecticut State University, B.S. (Business Management)

Intermediate and Advanced Trust Schools, American Bankers Association, Graduate Trust Certification

Overview

Kelly joined the firm's Trust & Wealth Management practice in 2014 to assist with the administration of the various investment, retirement and trust accounts managed by the practice.

Kelly assists families by:

- Preparing paperwork necessary to consolidate assets from various outside accounts and coordinating and monitoring the asset transfer process;
- Communicating frequently with the firm's investment advisor to ensure proper reserves are maintained or adjusted to meet changing cash needs of the family;
- Paying estimated taxes, overseeing the collection of documents for tax season, and reviewing drafts of tax returns prepared by clients' accountants;
- Paying bills and managing cash flow for clients, which frees them to focus on more enjoyable pursuits, whether spending time with family, enjoying hobbies, traveling, or otherwise;
- Organizing and executing charitable gifting plans each year and tracking the information for tax reporting.

Professional Designation

- Certified Trust and Financial Advisor (CTFA)