

Trust & Wealth Management

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Many of our clients seek assistance with wealth management when they sell a business, inherit wealth, retire or decide to step back from active management of their own assets. Our Trust & Wealth Management practice was established in 1995 to provide this exact assistance. The practice helps define goals, set objectives and coordinate various pockets of assets - e.g., retirement plans, low basis stock, investment accounts and pensions - to meet current cash flow needs and to provide for the future.

We also coordinate the investment and custodial aspects of asset management with the personal aspects of estate and retirement planning. We develop a plan to suit an individual client's particular circumstances. We do not manage the investments ourselves, but we carefully select investment managers who work closely with us and our clients. The result is an effective and economical long-term plan. Our clients appreciate the efficiency and security of having their affairs managed by their personal attorney who has detailed knowledge of their planning goals.

After a client's death, we are well positioned to understand the family needs and provide long-term management and oversight for the client's spouse and subsequent generations by serving as trustee or executor. Our goal is to provide our clients with the peace of mind that their assets are well managed for their security today and for their family's security in the future.

Our trust and wealth management services are managed by David L. Sullivan, CTFA. Please contact David or any attorney in our Trust & Wealth Management practice if you would like to learn more about these services.

TRUST SERVICES LOGIN