Dale & Lessmann LLP

Wealth Management

We will be there when you need us most.

Effective wealth management and estate planning requires experience, discretion, practical knowledge and understanding. We offer comprehensive wealth management and estate planning services for individuals, families and business associates.

Our commitment is to make available to our individual clients the breadth and the depth of the resources and the expertise which we offer to our corporate clients. We will be there when you need us most.

From taxation to employment law, from real estate law to partnership agreements to the establishment of limited liability companies, trusts and other business or estate planning vehicles: we have the necessary knowledge and experience to help make your plans become reality.

Our lawyers work for people and their families, beginning with contingency planning, designed to provide for the financial protection for loved ones, and moving to long-term estate planning, designed to reduce wealth transfer taxes and help ensure the fulfillment of your hopes and dreams after you are gone.

Dale & Lessmann LLP also has a substantial practice in the administration of estates, complicated will probate and estate administration, trust administration, post-mortem income tax return preparation and post-mortem real estate or business transactions.

We always recommend that individuals obtain professional legal advice in the preparation and review of their wills, trusts, powers of attorney and living wills. At Dale & Lessmann LLP we offer comprehensive services to individuals and families in the preparation and safekeeping of these key planning instruments.

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