Law Firms

Team

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Services

Investment Management
Financial Planning
Personal Trusts & Fiduciary Services

Overview

As fiduciaries ourselves we understand the relationship attorneys have with their clients and serve as a resource to strengthen and enrich these relationships. Our extensive experience working with clients across multiple generations prepares us well for this work. We are well versed in the numerous and often interrelated trust and estate issues attorneys may address with clients.

In many cases, LBA acts as a sub-advisor to law firms that serve as trustees for families, charities and other organizations.

We are ideally suited for this role when the client desires a portfolio of individually selected securities versus mutual funds. By using individual securities we can be absolutely specific about what the portfolio includes and excludes. This benefits the client, but also the law firm, which needs full transparency in its fiduciary relationship with the client.