Lowell Blake

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Financial Planning

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Clients

Individuals & Families
Foundations, Endowments & Charities
Law Firms

Overview

Choosing and managing investments is perhaps the most obvious element of wealth management, however other financial tasks demand equal care and attention. Indeed, there's little point in carefully managing an investment portfolio if its gains may be lost through poor budgeting, inefficient tax planning, ineffective use of retirement accounts, ill-advised real estate transactions or inadequate insurance coverage.

That's why LBA takes a holistic approach to wealth management, one that assures that all the pieces of investing and financial planning fit together. We work with our client's accounting, estate planning and insurance professionals to address complete legal and financial needs.

As clients evolve through different phases of life, periodic reviews allow us to assess how needs can change over time, including:

- Estate planning
- Tax planning
- Insurance coverage
- Social Security
- Retirement planning
- Elder care
- Charitable giving
- Succession planning
- Generational asset transfers
- College saving
- Real estate

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