SAGETRUST LAW GROUP

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THE SAGETRUST DIFFERENCE: *Don't Worry, We've Got This!*

Protecting and Preserving Wealth

SageTrust™ Law Group helps individuals, families and business owners to design and implement a plan that protects and preserves their assets while minimizing taxes and administrative burdens, which allows for the efficient transfer of wealth and leaves a lasting legacy from one generation to the next.

We cut through the legalese, and design a customized plan that is flexible, easy to understand, and affordable. We guide you through the process to accomplish your goals every step of the way.

Trusted Fiduciary

We work with families to tackle the administrative complexities of settling an estate, administering a trust, and handling the financial affairs of a loved one who is no longer able to handle such matters themselves.

With our combined trust/private banking experience, we are uniquely qualified to serve as a professional independent trustee for select clients, and can provide continuity in investment management by working with your designated financial advisor to manage your assets in the event of incapacity or death.

Customized, Understandable and Affordable Advice

WE LISTEN AND LEARN WHAT IS MOST IMPORTANT TO YOU

Every client is different, and there are no cookie cutter solutions. We listen carefully to help identify what is most important to you. We then design a customized plan to effectively accomplish your goals and objectives and maintain maximum flexibility and privacy.

We believe in providing affordable advice, with transparency and the upmost quality. Fixed fee arrangements are available for most core estate planning engagements and other services upon agreement with the client.

PROPER PLANNING PROVIDES PEACE OF MIND

We are dedicated to helping every client pave their path to greater financial security, asset protection, and independence.

Although it can sometimes be daunting to think about, taking the time to get the proper planning in place today provides peace of mind knowing that your personal, financial and business matters will be taken care of in the event of incapacity or death.

Diverse Perspective and Collaborative Approach

At SageTrust Law Group, we bring a unique and diverse perspective from experience in private law practice, Big Four accounting, trust/private banking, and family office firms.

Our diverse perspective fosters collaborative relationships with financial advisors and their clients, and allows us to fully serve our clients' needs.

Personalized Service

Our model of client service is built on relentless attention to detail and an unmatched commitment to personalized service, which provides the foundation for long-lasting relationships with every client.

We work closely with our clients and collaborate with their other advisors because we are committed to putting the interests and needs of our clients first.

We are admitted to practice in DC, MD, VA, PA, and OH.

OUR TEAM: Lori G. Booker, *JD, CPA* | Dawn M. Dale, *JD, LLM, CFP®* | Melinda Merk, *JD, LLM, CFP®*

Estate Planning | Asset Protection | Business Planning | Fiduciary Services | Tax Services | Family Office