



## THE SAGETRUST TEAM



**Lori Booker, JD, MBA, CPA**  
**Co-Founder/Managing Member**  
**202-441-1014 (direct)**  
**LBooker@SageTrustLaw.com**

Lori brings clients a unique background in accounting, law, tax, and personal finance. Lori started her career as a CPA at PwC, while attaining her law degree at Georgetown. She then acquired extensive legal experience advising high net worth clients on estate planning, probate, fiduciary income tax, and asset protection matters at Covington & Burling and Greenberg Traurig in Washington, DC.

After serving as in-house counsel for a financial advisory firm, Lori joined Wells Fargo Private Bank as a Senior Trust and Fiduciary Specialist, where she provided fiduciary expertise in the areas of trust and estate matters, investment management, wealth transfer techniques, and financial planning for high net worth clients.

Lori then formed her own boutique law and accounting firm prior to forming SageTrust™ Law Group.

Lori is originally from Cleveland, OH and is admitted in MD and DC and is a practicing CPA.



**Dawn Dale, JD, LLM, CFP®**  
**Co-Founder/Managing Member**  
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Dawn has extensive experience advising clients on all aspects of their financial lives. She has handled a wide variety of tax, estate, retirement and philanthropic matters; managed family office, and estate and trust administration/probate services; coordinated family meetings, governance and educational programs; and advised on planning with stock options, restricted securities, concentrated equity positions and closely held business interests.

Dawn began her career at a boutique law firm in Dayton, OH focusing on tax and estate planning. She then relocated to DC and joined Bank of America's Private Bank as a Wealth Strategist, while attaining her LLM in Taxation at Georgetown. She acquired extensive family office experience at GenSpring Family Offices and Abbot Downing. She then formed her own boutique law practice prior to forming SageTrust™ Law Group.

Dawn is originally from Girard, PA and is admitted in VA, DC, OH and PA. She is also a CFP® Professional.

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



Estate Planning



Asset Protection



Business Planning



Fiduciary Services



Tax Services



Family Office