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SERVICES: *Protecting and Preserving Wealth for Families and Businesses*

Estate Planning

Estate and trust planning is one of the most important things you can do for yourself and your family but is often overlooked or avoided due to a lack of understanding of how to best accomplish your goals. At SageTrust™ Law Group, we'll help to guide you through the process every step of the way.

Business Planning

From choice of entity and business formation to succession and exit planning, SageTrust Law Group has the legal and tax expertise to advise clients on business matters in coordination with their overall personal financial situation and estate planning.

Asset Protection

Asset protection is extremely important in today's litigious society. A car accident, professional liability claim, medical crisis, injured tenant, divorce and other lawsuits can expose your assets to judgment creditors. Various planning strategies can be utilized to legally protect your assets from future creditors. SageTrust Law Group can analyze your situation, and help you to implement asset protection planning strategies.

Fiduciary Services

Selecting an agent, executor or trustee is one of the most important estate planning decisions you will make. While naming a family member may be the initial choice, these individuals typically will not have the expertise to fulfill all of their fiduciary obligations without hiring legal, investment, and tax advisors. Potential conflicts can also arise between an individual serving as fiduciary and other family members.

Serious consideration should be given to designating an independent trustee, either alone or as a co-trustee with a family member or trusted advisor, with sufficient provisions in the trust document to remove and replace the trustee without court intervention.

With our combined trust experience from both the planning and trust administration perspective, SageTrust Law Group is uniquely positioned to advice fiduciaries as "agent" for executor or trustee, and to serve in a professional fiduciary capacity (e.g., as Trustee or Co-Trustee) for select clients.

Tax Services

Federal and state tax laws are ever-changing, which makes it important to work with an advisor who has the experience and knowledge to keep up with new tax developments that may impact your overall financial, estate and business planning. SageTrust Law Group takes a holistic approach in advising clients from both the legal and tax perspective.

Family Office

For successful entrepreneurs and business owners, the lines between business and personal matters are often blurred, requiring proactive coordination and collaboration among various advisors. For families of significant wealth, managing that wealth and the many issues surrounding wealth can be like managing a business.

With our diverse experience from private law, Big Four accounting, trust/private banking, and family office firms, SageTrust Law Group is uniquely qualified to serve as your "personal CFO" to ensure coordination of your wealth management, financial planning, tax planning and reporting, risk management, family education and philanthropy needs.

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

Admitted in DC, MD, VA, PA, and OH

www.SageTrust.Law