



REID AND RIEGE, P.C.
COUNSELLORS AT LAW

Fiduciary Services

Many of our clients seek assistance with wealth management when they sell a business, inherit wealth, retire or decide to step back from active management of their own assets. Our Fiduciary Services Group was established in 1995 to provide this assistance. We help define goals, set objectives and coordinate various pockets of assets – retirement plans, low basis stock, investment accounts and pensions – to meet current cash flow needs and to provide for the future.

The Fiduciary Services Group coordinates the investment and custodial aspects of asset management with the personal aspects of estate and retirement planning. We develop a plan to suit an individual client's particular circumstances. We do not manage the investments ourselves, but we carefully select investment managers who work closely with us and our clients. The result is an effective and cost-efficient long-term plan. Our clients appreciate the efficiency and security of having their affairs managed by their personal attorney who has detailed knowledge of their planning goals.

After a client's death, we are well positioned to understand the family needs and provide long-term management and oversight for the client's spouse and subsequent generations by serving as trustee or executor.

Our goal is to provide our clients with the peace of mind that their assets are well managed for their security today and for their family's security in the future.

The Fiduciary Services Group is managed by David L. Sullivan, CTFA. If you would like to learn more about the Fiduciary Services Group and our approach to managing trusts and IRAs, please contact David L. Sullivan at (860) 240-1022 or dsullivan@rrlawpc.com.



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