LEXINGTON™
FINANCIAL/LIFE MANAGEMENT

ANNOUNCING...

Please Welcome BSW to Our Alliance Team!

Hello Everyone,

Lexington Financial/Life Management is driven to deliver more for our clients. We continue to develop a deep bench and broaden the spectrum of services we provide. To that end, we would like to welcome Brown Smith Wallace and David Heilich to our Alliance Team!

Brown Smith Wallace is a nationally ranked top 100 full-service CPA and business advisory firm located in Saint Louis, Missouri with more than 300 employees. The firm serves its long-term base of family owned, private companies with audit, accounting and tax services as well as a wide variety of business consulting service. They provide value-added consulting services such as business performance consulting; business valuations; data analysis; cybersecurity; employee benefit plan audits; independent insurance consulting; internal audit, IT audit and other related risk services; litigation support; transaction advisory services; and specialty tax services such as family wealth planning, state and local taxes (including sales and use tax consulting), credits and incentives, property tax and international tax services. They are accountants and advisors guided by our passion for supporting and impacting the growth and success of their clients, colleagues and communities.

David Heilich is a senior partner with BSW and serves as our primary contact. He is also practice leader of the firm’s Family Wealth Planning Group. His specific areas of expertise include income tax compliance and consulting; estate planning; family business consulting; business succession planning; advanced planning; and estate, gift and trust compliance and consulting. David is a licensed Certified Public Accountant and an Accredited Estate Planner®. He is a member of the American Institute of Certified Public Accountants, the Missouri Society of Certified Public Accountants and the Estate Planning Council of St. Louis.

As a member of the Lexington 360 Alliance, David Heilich and the Brown Smith Wallace team bring deep experience in serving individuals, families, closely held businesses, and executives with comprehensive tax and wealth management services. They do not sell investments or products. As we do, they work with a client’s advisors as a team to provide independent and timely tax; business; and estate, gift and trust planning advice and services.

Thank you,

Dale E. Veitch

Dale E. Veitch,CIMC®
Founder and Chief Executive Officer

David. P. Heilich, CPA, AEP©
Advanced Estate and Tax Planning