



GREGORY W. KLIPSTEIN, JD*, LLM*
Director of Planning

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LLM, JD and BA from Temple University,
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GREGORY W. KLIPSTEIN is a Director of Planning for Lincoln Financial Advisors and is responsible for overseeing the firm's financial planning engagements, including the design, preparation, quality control, and implementation of those sessions.

Greg's areas of expertise include tax savings-motivated estate planning/asset protection strategies for high net worth individuals and their families, business succession strategies, and charitable planning. Greg typically focuses his efforts on families whose assets and future estates are worth in excess of \$5,000,000. The customized financial planning strategies Greg recommends are designed to optimally achieve each client's unique financial and non-economic objectives while remaining sensitive to each client's personal risk tolerance and other considerations.

Greg earned his LLM, JD and BA from Temple University. Prior to joining Lincoln Financial Advisors, Greg practiced as an attorney, focusing his practice on helping clients achieve their estate planning and business succession goals. Greg's previous experience as a counselor to business owners and their families is a valuable resource to Lincoln's clients and consultants.

Greg and his wife, Lori, make their home in Mullica Hill, New Jersey. Greg enjoys golfing, as his schedule allows.