

Lance E. Hennesay



Lance E. Hennesay, MBA, JD
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Lance Hennesay began his work career as an employee in his family's propane business and became a partner in 1990. While managing the business, he received an MBA in Finance. His Masters Thesis focused on how the capital asset structure of a closely held corporation impacts its fair market valuation. In 1996, while in law school, Lance negotiated the sale of the family business to National Propane, a publicly traded corporation. As part of the sales process, he implemented several estate planning, charitable planning and tax planning strategies to help minimize both income and estate taxes.

Prior to joining the Principal Financial Group®, Lance had his own law practice, specializing in estate planning and business law. The majority of his clients were business owners looking for advice on daily business operations and strategic estate planning.

Lance joined the Principal Financial Group in October of 2000 as Director of Advanced Markets. In this role he consulted with producers, clients, and their advisors on strategic business and estate planning issues that included executive benefit solutions for corporations, employee benefits for businesses, and estate planning for business owners and high net-worth individuals.

In 2005, Lance decided to develop his own clientele. With his legal, financial, management, and advanced markets experience Lance is able to help provide cutting edge solutions as his focus is exclusively on business owners, their companies, their executives and the unique needs of each.

Because this is such a dynamic industry, Lance is asked regularly to provide continuing education for attorneys, accountants and benefit providers discussing regulatory updates and the unique plan designs available to business owners.

We believe one cannot address a single area without it having an effect on another.

AREAS OF EXPERTISE

ESTATE PLANNING

- ESTATE CONSERVATION ANALYSIS
- LIQUIDITY SOLUTIONS FOR ESTATE TAXES
- FAMILY/CHARITABLE GIFT PLANNING

QUALIFIED BENEFITS

- DEFINED CONTRIBUTION/DEFINED BENEFIT PLANS
- CUSTOM CARVE OUT PLANS
- EMPLOYEE STOCK OWNERSHIP PLANS (ESOP)

PORTFOLIO MANAGEMENT

- ASSET ALLOCATION
- TOP TIER SERVICES

EXECUTIVE PLANNING

- DEFERRED COMPENSATION PLANS
- EXECUTIVE BONUS PLANS

BUSINESS SUCCESSION

- BUY/SELL AGREEMENTS
- KEY PERSON ARRANGEMENTS
- TRANSFER STRATEGIES

*JD is an educational degree and the holder does not provide legal services on behalf of the companies of the Principal Financial Group®.

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