



## Julie H. Helter

Associate  
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Julie focuses her practice on counseling clients regarding estate planning goals and individual considerations. She collaborates with clients to create an appropriate plan to transfer wealth and protect against risk. Her experience includes leading clients through the entire wealth planning process from start to finish, from drafting documents to funding trusts to naming beneficiaries.

### Services

- Private Client & Family Wealth Planning

### Education

- University of Dayton School of Law (J.D., 2019)
  - Dayton Law Review, research editor (2018-2019), staff writer (2017-2018)
- Florida State University (M.S.P., 2001)
- Wesleyan College (B.A., 1997)

### Bar Admissions

- Ohio
- Florida