

What Other's Say about
Jim Lange's Workshops:

“Maximizing IRA & Retirement Plan Assets”

“I just returned from one of the truly best estate planning sessions I've been exposed to. I read some of this guy's publications and was very impressed. His name is James Lange, a lawyer and a CPA. He's published quite a few articles on retirement and estate planning that have been peer-reviewed by the AICPA (American Institute of Certified Public Accountants). Their review of his work is at very least a mark of excellence.

Anyway, we had a two and one half hour session tonight in Jim's Law Offices in Squirrel Hill. Exceedingly well delivered, organized and useful. I actually got two new estate planning ideas and I thought I had read and understood everything from AAA to ZZZ!

He made a Powerpoint presentation with a booklet handout of every slide plus copies of several of his publications. Good and complete answers, lots of numerical examples and clear descriptions of various trust plans.

He is not selling or recommending any funds, equities, insurance, bonds, etc. You simply pay for his planning service. He also offers a free individual consultation to provide an initial estate planning assessment and cost for providing a complete plan.

From what I've read, talked to, listened to, and met with, he is, in my judgment ahead of and well above everyone else in this field that I've met.

His material broke down into two logical areas. The first period covered withdrawals, the Minimum Required Distribution rules, and beneficiaries in the clearest presentation I have experienced. The second period covered estate-planning techniques.

This guy is an exceptional resource.”

Robert I. Miller

Executive Director

*Pennsylvania School District Liquid Asset Fund and
Retired Manager*

Westinghouse Electric Corporation

Bettis Atomic Power Laboratory

“This is a highly complex field – very difficult to understand, retain and apply. I felt the presentation was excellent.”

Professor Norton Taichman

University of Pennsylvania

“Enlightening – insightful – excellent.”

Professor William Sutliff
CCAC – Boyce Campus

“Very good and clear presentation.”

Naama Lazor

“I came to the seminar prepared, having read several of your articles and still learned some new things.”

Professor David Knight
University of Pennsylvania

“Very useful to have both slide presentation and booklet of slide material.”

Margaret Wales, Retired

“Excellent, well organized presentation. Very patient with your responses.”

Professor Rodger O’Toole, Ph.D.
CCAC

“Very clear and concise — understandable — outstanding!”

Professor Nick Jordanoff
Duquesne University

“Very good seminar. Presentation was excellent. Mr. Lange is highly knowledgeable.”

Jack Paul
Retired Controller
Westinghouse Electric Corporation

“I further appreciate how much I don’t know, how complex the subject is, and why I’d feel more comfortable with expert assistance in the future.”

Walter Finch, Retired

“Excellent presentation! It addressed my current problems and questions.”

W. Robert Wilson
Retired, PPG Industries, Inc.

“Take it from a teacher; you have excellent up-to-date teaching skills.”

Mary Ann Seibel
Teacher
Baldwin-Whitehall School District

“You’re a good speaker. Interesting, professional, have something interesting to say.”

Professor Marek Druzdziel
University of Pittsburgh

“Good presentation of a very complex subject. One that can be very expensive upon your death. Very well presented and organized.”

Robert F. Zappa, Retired

“Excellent job!”

Emeritus Professor Harry Fowler
University of Pittsburgh

“Most informative seminar I attended.”

Anthony Tomeo
Retired Engineering Manager
Westinghouse Electric Corporation

“We realized we needed to put our legal and financial affairs in order after the birth of our son. In assisting us in designing and executing a will, Jim and his staff provided us with an invaluable service. Additionally, Jim helped us to begin the process of planning for the long-term financial needs of our growing family. He and his staff were always available to share their expertise and to provide guidance and answers to our questions.

We would not hesitate to consult Jim in the future for assistance with any additional financial or legal matters and take pleasure in heartily recommending him to others.”

Joseph Pierri, M.S., M.D.
Child and Adolescent Psychiatry Fellow
University of Pittsburgh Medical Center

Janet Arida, R.N., M.A.
Mother; Former Nurse Clinician

“I found Jim Lange made to order for my financial planning. I had a lot of questions and Jim took the time and patience to explain everything to me. I feel more secure knowing that everything is where it should be, thanks to Jim.”

Rose Zwick

“We recently consulted James Lange in the process of estate planning. The experience was a very positive one. Mr. Lange enthusiastically presented us with a wide selection of possible ideas which were very clearly and efficiently summarized--those which were well tested by experience were distinguished from those of a more speculative nature--and then, most importantly, made no attempt to pressure us to follow a particular course of action. Instead we were encouraged to consider matters at our leisure and make our decisions with availability of further discussions if necessary. We felt very comfortable and well treated throughout the process and we have no hesitation in recommending their services to our friends.”

Professor & Mrs. Victor J. Mizel
Carnegie Mellon University

“We have dealt with Jim Lange for several years in the areas of estate planning, financial management and tax preparation. In all these areas, we have received competent and practical advice, and prompt attention to our needs. Jim is especially knowledgeable in areas of concern to college faculty. His advice has been most helpful as we approach our retirement years.”

Lois J. and Juerg X. Saladin
University of Pittsburgh