ORBA®
Accounting | Tax | Advisory

K. PAIGE KIRKLAND, CFP®

SHE | HER

HEAD OF FAMILY OFFICE SERVICES GROUP

kkirkland@orba.com
O 630.703.7444

Paige Kirkland is the Head of the firm's Family Office Services Group. She is a CERTIFIED FINANCIAL PLANNER™ (CFP®) who brings more than ten years of experience as a CFP® and attorney specializing in estate, tax and charitable planning.

Paige works with high-net-worth families to prepare and review estate, tax and financial planning. She also manages family assets, investments, properties and trusts; coordinates financial statements and tax returns; directs business and personal tax matters; provides document management; supervises bill paying and bookkeeping; conducts family meetings; supports financial education for younger generations; assists with charitable planning; and manages estate and gift planning.

As the head of the Family Office Services Group, she leads the groups strategic direction, fosters departmental growth, and oversees the training and development of team members.

PROACTIVE

Paige believes in an approach where she is able to work collaboratively with her clients' financial and legal professionals to ensure client goals are met and exceeded. She excels at establishing and maintaining close relationships with her clients and their families and fosters an environment aligned with family values. She is responsible for structuring and developing the firm's Family Office Group.

OUTSIDE OF THE OFFICE

Outside of the office Paige spends time with her two (human) children and ten dogs. She is an avid bookworm and loves to spend time in the sunny outdoors.

SERVICES

Consulting for Businesses
Consulting for Individuals
Family Office Services
Tax
Wealth Management

BAR ADMISSIONS

- State of Kentucky
- State of Tennessee

CERTIFICATIONS AND LICENSES

- Certified Financial Planner (CFP)

EDUCATION

- LL.M., Taxation, University of Alabama
- J.D., Concentration in Business Transactions, University of Tennessee
- B.S., Criminal Justice and Psychology, Saint Joseph's College