

Lorrie Allegra

MANAGING DIRECTOR, BT FAMILY OFFICE



BT Family Office (BTFO) is a trusted partner to families navigating the complexities and joys of substantial wealth. We help families sustain their prosperity, values and legacy over multiple generations. A partnership with BTFO offers your family the benefits of a comprehensive family office without taking on the burdens of owning, and managing one.

This is achievable through an

individualized approach for your family, coupled with our robust experience and extensive network serving families like yours.

In addition, through our affiliation with Bennett Thrasher, your family office will benefit from access to industry leading accountants and advisors with advanced insights and top-tier expertise across financial disciplines.

Lorrie is Managing Director of BT Family Office. In her role, Lorrie advises ultra-high net worth families, individuals, entrepreneur's and closely-held businesses on matters related to investment planning, coordination and oversight, family legacy, succession and philanthropy, risk management, lifestyle management and integrated wealth planning and reporting.

Lorrie has over 25 years of consulting, operational, strategic, family office, sales and marketing experience. Prior to BT Family Office, Ms. Allegra served as the Director of Strategy for BT Wealth Management. Ms. Allegra previously served as SVP and Chief Investment Officer of Lincoln Lee Investments, a family office, working with a high net-worth family on asset allocation, alternative investments, private fund administration, estate planning and charitable giving. Prior to Lincoln Lee, Lorrie specialized in cutting edge healthcare technology with athenahealth, WebMD and Healtheon.

Lorrie and her husband, Patrick, live in Atlanta with their four children. Lorrie's interests include education, philanthropy, soccer, cycling, and travel.

CONTACT

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PRACTICE AREAS

Family Office

Investment Advisory

Financial Reporting

Family Governance

Trust & Estate

INDUSTRY EXPERIENCE

Family Office

Ultra High Net Worth

EDUCATION

BCBA Accounting and International Business
– American University, Washington, DC

PROFESSIONAL AFFILIATIONS

FORGE Family Office Network

Atlanta Family Office Group

COMMUNITY INVOLVEMENT

Board Member, Private Family Foundation