Gresham

Jonathan Lee

Associate Wealth Strategist

As an Associate Wealth Strategist at Gresham, Jon assists the Client Service Team in the higher level design and review of wealth transfer plans tailored to the unique needs of client families.

Jon joined Gresham in 2023 and supports the Client Service Team in helping families design and implement wealth transfer plans aligned with their long-term objectives. He draws on his background in trust and estate planning to help clients make informed decisions related to succession planning, trust and estate administration, asset protection, and philanthropy.

Prior to joining Gresham, Jon began his legal career handling probate, guardianship, and contested estate matters. He later worked at a Chicago-based law firm as an estate planner.

Outside of work, Jon enjoys spending time with his daughter, whose curiosity and active spirit make every day an adventure. He is also an avid traveler, with Italy, Japan, and Portugal next on his list.

Member, Chicago Estate Planning Council

EDUCATION BACKGROUND

- B.A., Sociology, Syracuse University
- J.D., Washington University School of Law

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