



**Lori Lea Shelley**  
Partner

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Lori Lea Shelley has been practicing in the areas of estates and trusts, probate, corporate, and transactions. Ms. Shelley routinely advises clients with respect to wills and trusts, estate and trust administration, estate and gift taxes, business transactions, promissory notes, shareholder agreements, and business entities. Her practice spans a wide range of industries and clients, including companies in the technology, manufacturing and consumer goods industries.

Ms. Shelley represents public school districts, counties and cities and underwriting companies in all facets of public finance including bond issues, re-financings, lease purchase agreements as well as district tax levy issues. Similarly, she routinely advises school district clients in the creation and maintenance of educational foundations.

In the Public Finance arena, Ms. Shelley has been rated top five Bond Counsel in Missouri by Reuters the last two years.

Ms. Shelley also counsels clients involved in leveraged buy-outs and private placement securities offerings to comply with federal and state securities laws, which includes creation of equity and debt financing solutions, debt instruments, investor questionnaires, and subscription agreements. Besides general estate planning and probate work, she also represents business clients with respect to their general business and tax planning, including formation and succession planning. She has experience in organizational and succession planning for privately held businesses and insurance financing.

#### *Areas of Practice:*

- Public Finance
- Disclosure Counsel
- Municipal Leasing
- Economic Development
- Bank Counsel
- Estate Planning
- Trusts and Probate
- Corporate Law
- Mergers and Acquisitions
- Taxation
- Business Succession Planning
- Bonds
- Education Law
- Labor & Employment
- Appellate Practice

#### *Education:*

- University of Missouri – St. Louis, B.S.B.A., 1993
- St. Mary's University School of Law, J.D., 1996

#### *Bar and Court Admissions:*

- Missouri Bar
- Texas Bar
- U.S. Tax Court