LORI PLESCIA, CFP, CPA*, PFP, QPFC

PARTNER ▸ TAX & BUSINESS SERVICES

314.626.7485   lori.plescia@marcumllp.com

Lori Plescia is a partner in the Tax & Business Services Division. She assists clients with the design and implementation of retirement plans customized to their businesses.

Personal service is extremely important to Ms. Plescia in all of her client dealings, and many clients benefit from her experience and knowledge. Saving for retirement is an important concern for clients in the current business environment. She is adept at helping them understand the retirement plan options available to them in this ever-changing area and assists with the implementation of plans that help clients meet their financial goals.

In 2007, Lori earned her Series 65 license as an Investment Advisor Representative, as well as the Personal Financial Planner (PFP) designation awarded by the American Institute of CPAs (AICPA). In 2018, she earned the Certified Financial Planner (CFP), a designation awarded by The Certified Financial Planning Board.

Prior to joining Marcum, she was principal-in-charge of retirement plans at BWTP P.C.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Missouri Society of Certified Public Accountants (MOCPA)
American Society of Pension Professionals and Actuaries (ASPPA)

PRACTICE FOCUS

- Tax Planning
- Estate Planning
- Retirement Planning
- Investment Planning

EDUCATION

- MBA,
  University of Missouri
- Bachelor of Arts in Psychology,
  Bachelor of Arts in Zoology
  University of California at Davis

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