

K A R I E L . R E Y N O L D S

Messaging & Positioning
Engagements

Juniper Legacy: Website Development | Creative Direction | Brand Messaging



SCHEDULE A CONSULTATION

HOME SERVICES ABOUT CONTACT CLIENTS

Preserve Your Legacy:
Navigate Life's Twists and Turns with Confidence

WORK WITH US

LEGACY

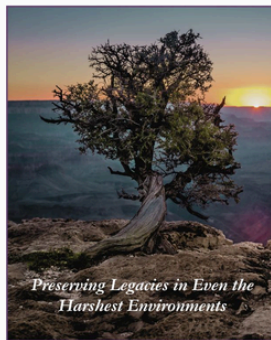
Jennifer was launching a new [tax advisory practice](#) for high-net-worth clients and needed a website that could establish credibility from day one.

I wrote the copy, acted as creative director, secured and directed a designer to build the site, coordinated Jennifer's headshot session, and sourced imagery around a deliberate visual theme — resilience in harsh environments, a quiet nod to the Juniper tree the brand is named for and the strength it signals to clients who have a lot to protect.

The result is a site that communicates sophistication and trust at first glance.

Juniper Legacy: Company One-Sheet

Leveraging the copy and branding developed for Jennifer's new website, I created a one-sheet for her to share with referral partners and potential clients via email.



Founded by **Jennifer Lorenzen, CPA, MST**, Juniper Legacy's tax advisory services and mission are rooted in Jennifer's decade-long specialization in trusts, estates, and rental real estate, her passion for educating clients on their options, and her dedication to staying ahead of an ever-evolving regulatory landscape.

Juniper Legacy guides clients through life's twists and turns, empowering them to grow, preserve, and sustain their legacies in even the harshest environments.

Tax Guidance for Rental Real Estate Investors, Trusts, and Taxable Estates

TAX ADVISORY SERVICES:

- COMPREHENSIVE TAX PLANNING
- GIFT AND ESTATE PLANNING
- REAL ESTATE INVESTMENT PLANNING
- RETIREMENT PLANNING
- TAX GUIDANCE FOR EXECUTORS AND TRUSTEES

What our clients are saying:



"Jennifer has a hands-on approach and a true advisor approach to helping high-net-worth individuals. She takes the time to listen and learn and then implements strategies that help create a great outcome, remembering the future as well as the now."

- Kal Balian Antoun Mortgage Advisor, CLA, RM Specialist, RCS-D



"What truly sets Jen apart is her proactive mindset. She doesn't just respond to problems—she anticipates them. She brings creative, well-researched solutions to the table, often spotting planning opportunities."

Jen doesn't just prepare tax returns—she becomes a strategic partner in her clients' long-term financial picture."

- Vanessa Terzian

[CLICK HERE TO SCHEDULE A CONSULTATION](#)



Jennifer Lorenzen, CPA, MST FOUNDER & PRINCIPAL

- 30+ years of experience in tax advisory, return preparation, accounting, and business management.
- Specializing in tax advisory for rental real estate investors, trusts, and taxable estates.
- Past president, San Gabriel Estate Planning Council
- Member, American Institute of Certified Public Accountants (AICPA), California Society of CPAs, San Gabriel Estate Planning Council, ProVisors
- Graduate Certificate in Estate Planning from Golden Gate University

A Strategic Partner in Preserving, Growing, and Sustaining Legacies

OUR CLIENTS:

- HIGH-NET-WORTH INDIVIDUALS
- RENTAL REAL ESTATE OWNERS
- TRUSTEES
- ESTATE ADMINISTRATORS

OUR PARTNERS:

- TAX PROFESSIONALS
- TRUST & ESTATE ATTORNEYS
- FIDUCIARIES
- CORPORATE TRUSTEES
- WEALTH MANAGERS

Juniper partners closely with clients and their trusted advisors. She takes a collaborative approach, actively listening and asking insightful questions before offering **tailored solutions**. Her clientele benefits from her **forward-thinking mindset** and **expert guidance** in navigating complex financial landscapes in an ever-evolving regulatory environment.

Minimizing Liabilities and Maximizing Wealth

Expert tax guidance to safeguard legacies for generations to come.



[CLICK HERE TO SCHEDULE A CONSULTATION](#)

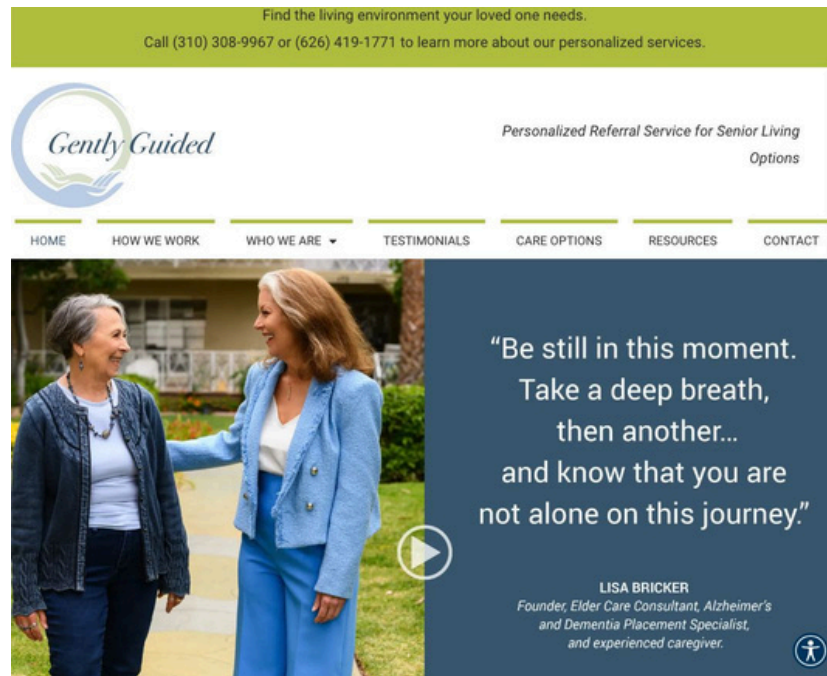
Gently Guided, LLC: Website Update | Creative Direction | Brand Messaging

Lisa Bricker hired me to update her website copy. After spending time with her and learning the story behind Gently Guide, it became clear that a few tweaks wouldn't do it justice.

Lisa's path to senior placement consulting began with her own family's Alzheimer's journey — an experience that gave her a depth of empathy and expertise her website simply wasn't communicating. Her business runs largely on referrals, but when potential clients land on her site, they need to feel immediately that they are in the right hands.

I recommended a full overhaul. We brought in a professional colleague for video and photography, rewrote the copy to speak directly to the families visiting her site, and restructured the homepage so visitors immediately understand who Lisa is, what she offers, and how her process works. Her introductory video now leads the experience, followed by a clear explanation of the senior living options she advises on and a transparent look at her process.

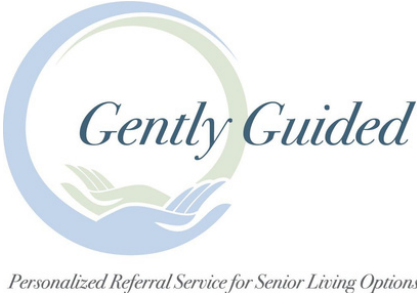
The redesigned Gently Guide website honors Lisa's personal journey and her deep commitment to the families who find her and the colleagues who send them her way.



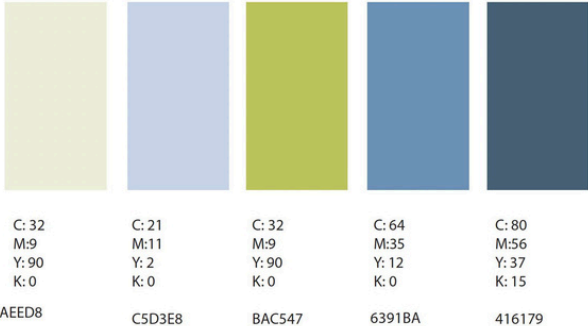
Gently Guided, LLC: Brand Refresh

In addition to updating all website copy, I provided Lisa's long-term graphic designer guidance on creating a new color palette with a fresh, professional aesthetic.

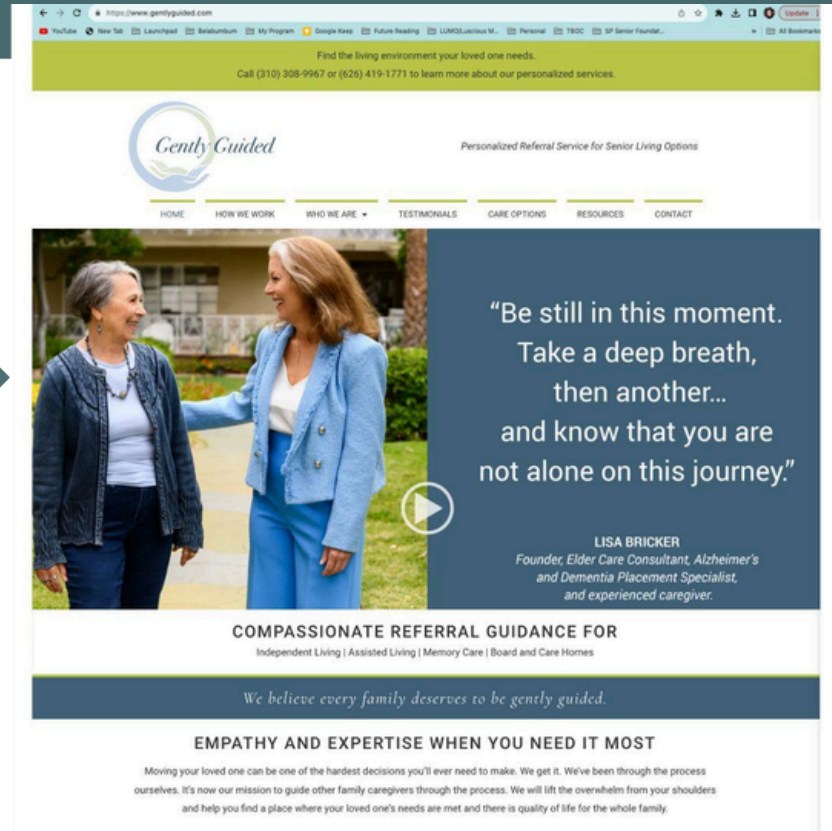
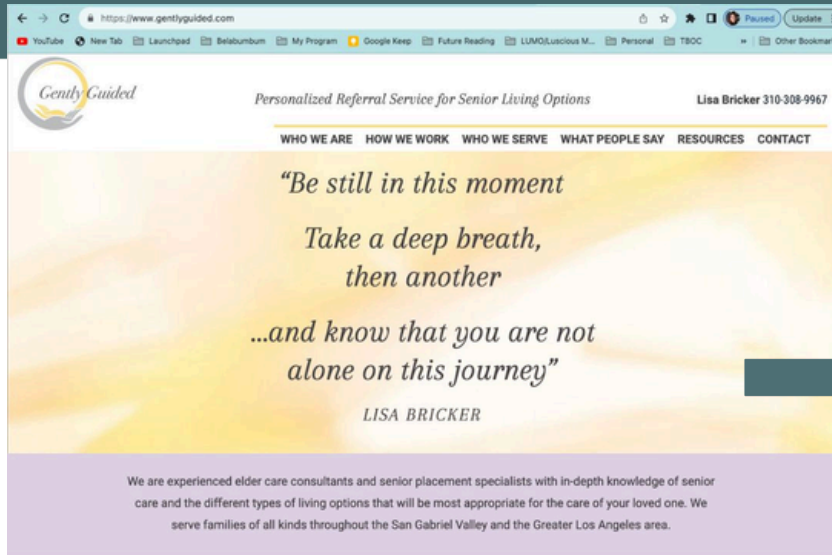
The new logo established a color palette for Lisa's website and marketing materials.



Gently Guided



Gently Guided, LLC: Website Update



Lisa Bricker - Elder Care Consultant and Placement Specialist, Leadership Coach



COMPASSIONATE REFERRAL GUIDANCE FOR Independent Living | Assisted Living | Memory Care Board and Care Homes

Gently Guided, LLC: Brand Messaging

We leveraged World Alzheimer's Month and Lisa's personal story to announce the new website to Lisa's colleagues and friends. We established a Constant Contact account for email marketing and shared posts on her rebranded LinkedIn profile.

Company Newsletter

Home Marketing campaigns Contacts Reporting Tools Create

Preview

Every Family Deserves To Be Gently Guided



Personalized Referral Service for Senior Living Options

Independent Living | Assisted Living | Memory Care
Board and Care Homes

Hello Lisa,

Did you know that six million Americans are living with Alzheimer's? I certainly did not understand this disease's prevalence or nuances when my husband Gary started showing subtle signs that something wasn't quite right at age 55. After years of not knowing what was happening, Gary was finally diagnosed with Early-onset Alzheimer's at 63. My 15-year journey with Gary informs my work as an Alzheimer's and Dementia placement specialist and it fuels my passion for supporting family caregivers.

I'm happy to share my personal story and announce the launch of my new website during World Alzheimer's Month. What had started out as an update to my website morphed into a full-scale rebrand to better share my story and commitment to supporting families through one of the most difficult decisions they'll ever have to make.

Please reach out if I can answer any questions. I'd be honored to be a resource for you for all of your senior living needs.

With warmth, respect and appreciation,

LinkedIn Posts



Lisa Bricker · 1st
Alzheimer's & Dementia Placement Specialist | Elder Care...

1mo · 🌐

I'm excited to introduce my new website. What had started out as an update to my website morphed into a full-scale rebrand to better share my story and commitment to supporting families through one of the most difficult c...see more



You and 55 others

12 comments · 3 reposts



Lisa Bricker · 1st
Alzheimer's & Dementia Placement Specialist | Elder Care...

1mo · 🌐

🌟 Today, on World Alzheimer's Day, I'm reflecting on my 15-year journey navigating this devastating disease and the thinking of the millions of family caregivers facing the challenges and uncertainties I faced as the care...see more



You and 255 others

45 comments · 5 reposts