



LASSUS WHERLEY

A Subsidiary of Peapack-Gladstone Bank

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“We spend more time asking clients about how they are, what their goals are and where they want to be in the future than talking with them about specific assets or investments. When we started, we wanted to build a relationship with each client, one client at a time, and we still do that today.”

[How do I get started?](#)

Lassus Wherley is a wealth management firm with expertise in financial planning, investment management, tax preparation, trust services, and family office support with offices in New Providence, NJ and Bonita Springs, FL. We work with individuals, couples, families, pension and profit sharing plans, trusts, estates, charitable organizations, corporations and other business entities. Using a team approach that we have developed over more than 30 years, we have helped hundreds of clients build secure financial futures.



Click on this icon throughout the site to read about how we make a difference to our clients, our community or our profession.

WHY WORK WITH A FIDUCIARY?



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Zuzana Harvis earns Project Management Professional (PMP)[®] Credential

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WHO WE ARE



WHAT WE DO



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