

Wealth Strategist Profile



Joan Crain

Senior Director, BNY Mellon Wealth Management

Joan Crain is a senior director for BNY Mellon Wealth Management. As a national wealth strategist, Joan works closely with wealthy families and their advisors to provide comprehensive wealth planning.

Joan joined the firm in 2001 and has more than 25 years of experience working with large multi-generational families. She specializes in family governance, philanthropic planning and tax and estate planning. She is frequently invited to speak to clients and professional groups such as the American Bar Association, the American Institute of CPAs and numerous estate planning councils throughout the United States.

Education

- Master of Business Administration, Rollins College
- Bachelor of education, Queens University
- Bachelor of music, McGill University

Certifications

- Certified Financial Planner® professional
- Certified Trust and Financial Advisor
- Certified IRA Specialist from the American Bankers Association

Memberships

- Executive Committee, Florida Bankers Trust Division
- Board of Directors, Community Foundation of Broward

Recent Notices, Publications, and Awards

- 2009 Trust Banker of the Year, Florida Bankers Association (FBA)
- Frequently quoted fiduciary and family governance expert and author of articles in business publications including *The Wall Street Journal*, the *New York Times*, *Trust & Estate* magazine and *Fortune*
- Featured speaker at conferences and seminars for wealth planning groups, including the American Bar Association, American Institute of CPAs, and numerous estate planning councils throughout the United States



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