Wealth Strategist Profile

Joan Crain, CFPr®, TEP

Recently Retired Senior Director,
Global Family Wealth Strategist
BNY Mellon Wealth Management

As a global family wealth strategist at BNY Mellon Wealth Management, Joan worked closely with wealthy families and their advisors to provide comprehensive and customized wealth planning. She specializes in cross border planning, business succession, philanthropy and family governance.

Joan has more than 25 years of experience working with individuals and families, with special focus on the legal, tax and personal challenges when navigating through major life transitions.

Joan has frequently been invited to speak to clients and professional groups such as the American Bar Association, The Hong Kong American Chamber of Commerce and numerous estate planning councils throughout the United States, Canada, the Middle East and Asia. An author of many white papers on multigenerational and multinational planning, she was one of the original contributors to the GCC Governance Code of the Family Business Council-Gulf and was interviewed live on CNBC-Asia.

Education

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

Certifications

- Certified Financial Planner® professional (CFP)
- Certified Trust and Financial Advisor (CTFA)
- Trust & Estate Practitioner (TEP)

Memberships

- Executive Committee, Florida Bankers Trust Division
- Past Chair-Board of Directors and current member-Investment Committee, Community Foundation of Broward
- Executive Committee, annual Attorney-Trust Officer Liaison Conference, Florida

Recent Notices, Publications, and Awards

- 2017 Industry Thought Leader, Global Finance magazine
- 2009 Trust Banker of the Year, Florida Bankers Association (FBA)
- Frequently quoted fiduciary and family governance expert in business publications including *The Wall Street Journal*, *Financial Times, The New York Times, The Economist and Peak Wealth-Hong Kong*
- Author of articles in professional journals such as *The American Journal of Family Law* and *Trusts & Estates magazine*

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