Joan K. Crain, CFP®, TEP®, AEP® (distinguished)

Global Wealth Advisor, J Crain Consulting

joan@jcrainconsulting.com
https://www.linkedin.com/in/joancrain/


Joan, through her consulting company, works with families and their advisors to help plan and execute the transition of family wealth to children and future generations.

As a member of a family's estate planning team, she provides an independent perspective and helps coordinate the tough tax and legal issues with the equally challenging human side of family wealth.

Joan has been inducted into the National Association of Estate Planners & Councils' Hall of Fame. She has 30 years of experience in senior leadership roles in trust administration, tax strategies, international wealth planning and family governance at major global financial institutions, including Bank of New York Mellon and Northern Trust.

## Example: Consulting services

* Consult with clients and their advisors on wills, trusts and related documents before and/or after execution. Coordinate detailed provisions with tax and legal advisors to best reflect family's wishes and goals.

* Coach younger family generations of beneficiaries on their future inheritances and prepare them as responsible stewards of family wealth. Plan and facilitate family meetings.

* Guide succession planning for family businesses.

* Consult on cross border wealth planning for families with international connections.

## Education

* Master of Business Administration, Crummer Graduate School/Rollins College
* Bachelor of Education, Queens University
* Bachelor of Music, McGill University

## Awards, Publications and Presentations

* Hall of Fame inductee, National Association of Estate Planners & Councils

* Hall of Fame inductee and Trust Banker of the Year Award, Florida Bankers Association

* Industry Thought Leader Award, *Global Finance Magazine*

* Author of multiple articles in professional journals including *Trusts & Estates,* the *American Journal of Family Law*, and *STEP Journal* (international wealth planning). Original contributor to the *GCC Governance Code* of the Family Business Council-Gulf

* Media featured expert on trusts, estates and family governance, including interviews by global media such as *The Wall Street Journal*, *The New York Times* and *The Economist*, and live on CNBC-Asia television

* Presenter at U.S. and international conferences for groups such as the American Bar Association, the American Institute of Certified Public Accountants, the Hong Kong Chamber of Commerce and community foundations and estate planning councils throughout North America, Asia and the Middle East