# Joan K. Crain, CFP®, TEP, AEP® (distinguished)
## Global Wealth Advisor, J Crain Consulting

Joan collaborates with families and their advisors to plan and execute the successful transition of family wealth to children and future generations.

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

Joan is a member of the Hall of Fame of the National Association of Estate Planning Professionals. 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.

**Sample services**

* Review wills, trusts and related documents before and/or after execution. Co-ordinate detailed provisions with tax and legal advisors to best reflect family's wishes and goals.

* Coach upcoming generations as beneficiaries of their future inheritances and responsible stewards of family wealth. Plan and facilitate family meetings.

* Lead family business succession planning.

* Advise on cross border planning for families with international connections.

**Education**

* Master of Business Administration, Crummer Graduate School/Rollins College (GPA 4.0)
* Bachelor of Education, Queens University
* Bachelor of Music, McGill University (First Class Honours)

**Publications, Presentations and Awards**

* 2022 Hall of Fame, National Association of Estate Planning Councils

* 2022 Trust Banker of the Year and member of Hall of Fame, Florida Bankers Association

* 2017 Industry Thought Leader, Global Finance

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

* Featured expert on trusts, estates and family governance, including quotations in global publications such as *The Wall Street Journal*, *The New York Times* and *The Economist*, and a live interview on CNBC-Asia

* Key speaker at national and international conferences for groups such as the American Bar Association, the American Institute of CPAs, the Hong Kong Chamber of Commerce and community foundations and estate planning councils throughout North America, Asia and the Middle East