Jo Ann Engelhardt

Bessemer Trust

Palm Beach, Florida

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Ms. Engelhardt is a Managing Director and the Regional Compliance Liaison for Bessemer Trust in Palm Beach, Florida.

Prior to joining Bessemer, Ms. Engelhardt was President and CEO of Merrill Lynch Trust Co. (Florida) and served as Chief Trust Officer of Citicorp Trust in Palm Beach. Ms. Engelhardt also held positions as an Associate Attorney in the Trusts & Estates department of Carter, Ledyard & Milburn, and as Law Clerk to Hon. Millard L. Midonick, Surrogate’s Court of New York County.

Ms. Engelhardt received a B.A. from Barnard College and a JD and LL.M from New York University School of Law.

Ms. Engelhardt is a member of the American and New York Bar Associations, serves on the Executive Committee of the ABA’s Real Property, Trust & Estate Law Section, as a Special Advisor to the Commission on Racial and Ethnic Diversity in the Profession, and as a Section delegate to the House of Delegates. She serves on the Board of the USS JFK Project, and as the Class of 1975 Fund Chair for Barnard College.

Ms. Engelhardt is a Life Fellow of the American Bar Foundation and has lectured for the Society of Financial Service Professionals, ALI-ABA, Practicing Law Institute, NYU’s Summer Institute in Taxation, and the ABA. She has been published in the ABA Real Property, Probate & Trust Law Journal; Trust and Estates Magazine; and others. In 2007 she was named by Global Investor Magazine as one of the “20 Highly Regarded Women in Wealth” and in November, 2008, she was honored with the Distinguished Accredited Estate Planners Award by the National Association of Estate Planners and Councils.