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THE 50 MOST INFLUENTIAL WOMEN IN PRIVATE WEALTH

Back for its second year, *PAM* has compiled peer nominations and the views of an editorial panel to feature the 50 most influential women in the private wealth industry.

This year's list includes 18 new names, and many returning women who have continued to positively impact the ever-growing and ever-competitive private wealth arena. Women spearheading socially responsible investing, digital advice, philanthropy and those who have been promoted into leadership positions have all been recognized this year.

This year's process to find the 50 most influential women in the private wealth sector, which saw a record number of nominations made, took into account the level of responsibility the female executive has at her firm; her impact on the private wealth space and any other details which might elevate her standing in the industry.

Read on to learn more about the women listed – in alphabetical order – who are among the most powerful and empowering women in private wealth.

Carol Pepper

Carol Pepper

FOUNDER AND CEO, PEPPER INTERNATIONAL LLC

Pepper founded the New York-based family office which bears her name in 2001. She was among the most frequently nominated women this year. Pepper also co-authored the book *The Seven Pearls of Financial Wisdom, A Woman's Guide to Enjoying Wealth and Power*.

Marie Arrigo

PARTNER AND CO-LEAD, FAMILY OFFICE PRACTICE, PERSONAL WEALTH ADVISORS, EISNERAMPER LLP

Alongside providing tax consulting and compliance services to family offices, individuals, trusts and estates, and closely held businesses, Arrigo also chairs EisnerAmper's philanthropy and charitable giving practice for the firm's Personal Wealth Advisors Group.

NEW

Gabrielle D. Bailey

MANAGING DIRECTOR, ATLANTIC TRUST

Bailey serves as chief fiduciary officer for the firm, which is part of Canadian banking giant CIBC. With more than 16 years of industry experience, Bailey oversees the firm's fiduciary activities and serves as head of the trust committee. In addition, she leads the growth of Atlantic Trust's Delaware office by engaging with estate planning professionals around the country and working with relationship teams.

Gabrielle D. Bailey

Nandita Bakhshi
PRESIDENT, BANK OF THE WEST

Prior to Bank of the West, Bakhshi held several leadership roles at TD Bank, most recently as executive vice president and head of North American direct channels. Earlier this year, she took the job at Bank of the West, with her new colleague Stefaan Decraene noting Bakhshi's "extensive experience, visionary thinking, relentless customer focus and philosophy".

Nandita Bakhshi

Leigh-Alexandra Basha
PARTNER, PRIVATE CLIENT PRACTICE GROUP AT MCDERMOTT, WILL AND EMERY

Basha, one of the most prominent private client lawyers in the country, made the move to McDermott, Will & Emery from Holland & Knight in 2015, to establish the firm's private client group practice in Washington D.C., which she is head of.

Charlotte Beyer
FOUNDER, INSTITUTE FOR PRIVATE INVESTORS (IPI)

As founder of the Institute for Private Investors (IPI), accomplished author and public speaker, Beyer has been the recipient of countless Lifetime Achievement awards and commendations during her decades of experience in the industry.

Jill N. Creager

Linda Bourn
LEADER OF FAMILY ENTERPRISE SERVICES, CRYSTAL & COMPANY

Bourn, a frequent contributor to industry publications, has 18 years' experience in risk and insurance management, having previously served at Wilmington Trust as managing director of family office services, as a manager within a Northeast family office, and Marsh PCS as family office practice leader.

Mary Callahan Erdoes
CEO, J.P. MORGAN ASSET MANAGEMENT

Long thought of as one of the most powerful women on Wall St, Callahan Erdoes has led the banking giant's asset management division since 2009.

Coventry Edwards-Pitt

Hilary Corman
HEAD OF ASSET MANAGER CHANNEL SALES, BLACKROCK

Cited among the top 20 women in hedge funds, Corman joined BlackRock in 2013 with over 20 years of experience in investment banking and institutional equity brokerage.

Wendy Craft
EXECUTIVE DIRECTOR AND CHIEF OPERATING OFFICER, THE GONZALEZ FAMILY OFFICE

Craft only recently took on the role at the Gonzalez Family Office, but is something of a heavyweight in the industry. Prior to moving into the job in August 2015, she held senior positions at single family offices MFR Equity and Fulcrum Securities, as well as at Schneider & Schneider Inc.

Jill N. Creager
FOUNDER AND CEO, PROVIDENCE FAMILY OFFICES, LLC

As the creator of software system iPaladin, which allows families to set up their virtual family office and family trust company, Creager is one of the most forward-thinking professionals in the industry. Having founded Providence Family Offices in 2008, Creager's company has grown to now offer licensing of the iPaladin platform to fellow family office services firms.

Kate Randall Danella
HEAD OF PRIVATE WEALTH MANAGEMENT, REGIONS BANK

Danella has moved quickly up the ranks of Regions Bank since joining the firm in 2015 as the wealth strategy and effectiveness executive. In May this year, it was announced she would head up the firm's private wealth division.

Jaime Desmond
CHIEF OPERATING OFFICER, LADENBURG THALMANN ASSET MANAGEMENT

Named for the first time as one of the most influential women in private wealth, Desmond has an all-encompassing role at the asset management firm, overseeing legal, compliance and operations, and is directly responsible for product and personnel management, marketing strategy, and strategic partnerships.

Lisa Dolly
CEO, PERSHING LLC, A SUBSIDIARY OF BNY MELLON

Earlier this year, Dolly was named CEO at Pershing LLC, having been promoted from her role as chief operating officer. As COO, colleague Brian Shea said Dolly was 'exemplary' during her three-year tenure.

Coventry Edwards-Pitt
MANAGING DIRECTOR AND CHIEF WEALTH ADVISORY OFFICER, BALLENTINE PARTNERS

At the Massachusetts-based firm, Edwards-Pitt is responsible for the management and thought leadership of the firm's wealth advising practice across the firm's more than 100 client family relationships. She also penned the book *'Raised Healthy, Wealthy and Wise'* in 2014, to critical acclaim.

Lisa Featherngill

MANAGING DIRECTOR OF WEALTH PLANNING, ABBOT DOWNING

As manager of the wealth planning division at Abbot Downing, Featherngill has been responsible for services including the Abbot Downing Clarity Process, financial and wealth transfer planning, family education, and financial administration, for over three years.

Diane Giles

SENIOR VICE PRESIDENT, MARSH PRIVATE CLIENT SERVICES

Giles was promoted to SVP in 2013, having given an outstanding performance in her previous position of vice president. She was also one of the experts enlisted to help create the book *'The Seven Pearls of Financial Wisdom'* which was published in 2012.

Sara Hamilton

FOUNDER AND CEO, FAMILY OFFICE EXCHANGE (FOX)

"She has forged a global network of the top family offices and distilled a code of best practices based on 27 years of research and interaction with hundreds of family offices in the course of doing business," read one nomination for Hamilton, whose FOX organization boasts a presence in more than 20 countries across the globe.

Abigail Johnson

PRESIDENT AND CEO, FIDELITY INVESTMENTS

Since taking over the reins of Fidelity from her father in October 2014, Johnson has overseen several divisional restructures including the formation of Fidelity Wealth Technologies, serving the financial advice industry.

Kelly Johnston

PRESIDENT, FIRST REPUBLIC TRUST COMPANY

Since joining First Republic Trust Company in 2013, Johnston has continued to impress her peers and was this year promoted from deputy manager to president. "Kelly is a terrific leader, and she has done an outstanding job of serving our trust clients and working closely with First Republic's bankers, wealth advisors and other investment professionals," said Bob Thornton, president of First Republic Private Wealth Management, at the time of Johnston's promotion.

Jennifer Kenning

MANAGING DIRECTOR, ALIGN

A pioneer in the impact investing space, Kenning was one of the most frequently nominated women this year. As managing director of Align, she is at the forefront of one of the most exciting sectors in private wealth, and with interest in socially responsible investing booming, her star is only set to rise further.

Sara Hamilton

Maria Elena Lagomasino

Veena Khanna

Veena Khanna

DIRECTOR OF STRATEGY AND IMPLEMENTATION, KEY PRIVATE BANK

A first-time receiver of this title, Khanna works out of the private bank's Cleveland, Ohio, corporate headquarters. Terry Jenkins, president of Key Private Bank, notably credited Khanna with being directly responsible for building the bank's 2015 go-to-market strategy.

Sallie Krawcheck

CO-FOUNDER, ELLEVEST

In her previous role as president of the global wealth and investment management division of Bank of America, Krawcheck was one of the most well-known women on Wall St. She moved on to co-found digital advisor Ellevest, aimed specifically at female investors, and owns the Ellevate Network, a global network for professional women.

Carol Kroch

MANAGING DIRECTOR OF WEALTH AND PHILANTHROPIC PLANNING, WILMINGTON TRUST

Kroch is responsible for overseeing charitable trusts at Wilmington Trust. She also chairs the Trust's wealth committee, a team of attorneys and financial planners who focus on trust and estate planning, income tax and financial planning, and philanthropic planning for clients.

Maria Elena Lagomasino

CEO AND MANAGING PARTNER, WE FAMILY OFFICES

As the founder of one of the most powerful family offices in the US, Lagomasino is widely known and respected by her peers. She is a founding member of the Institute for the Fiduciary Standard, and previously served as CEO of GenSpring Family Offices.

Alexandra Lebenthal

PRESIDENT AND CEO, LEBENTHAL HOLDINGS

A pioneer for women within the private wealth space, Lebenthal is one of the most prolific CEOs in the industry, as head of the muni bond franchise which bears her name.

Gemma Leddy

PARTNER-IN-CHARGE, PKF O'CONNOR DAVIES FAMILY OFFICE

One nomination noted Leddy as being regarded throughout the industry as a 'trendsetter and thought leader'. Leddy is responsible for building up PKF O'Connor Davies Family Office Services into the highly regarded and award-winning practice it is today, the nomination added. Leddy was also the first female to hold the role of partner in a mid-sized New York City CPA firm.

Katherine Lintz
FOUNDER AND CEO, MATTER FAMILY OFFICE

The founder of St. Louis, Missouri-based Matter Family Office is often called upon as a thought leader to take part on panel discussions. Originally called KBL Financial, Lintz founded the firm that would become Matter in 1990, with just two employees. Today, the firm represents over $5bn in net worth for its clients.

Linda Mack
FOUNDER AND PRESIDENT, MACK INTERNATIONAL

Mack is undoubtedly considered a leader in the industry; she is a frequent speaker at family office and wealth management conferences and leads 'closed door' family sessions on a broad range of strategic topics. Over the past 14 years, she has built Mack International into one of the most specialized boutique executive search and strategic human capital consulting firms in the US.

Daisy E. Medici
MANAGING DIRECTOR OF GOVERNANCE AND EDUCATION, GENSPRING FAMILY OFFICES

Medici joined GenSpring in 2006, and in addition to her primary role, advises the firm's executive committee and is a member of its leadership team. She focuses much of her time developing and administering GenSpring's proprietary tools and processes specifically designed to help families increase their chances of sustaining wealth over generations.

Tina Milligan
MANAGING DIRECTOR, CTC|MYCFO

CTC|myCFO has gone from strength to strength since its inception through the merger between CTC Consulting and Harris myCFO. Milligan has been instrumental in this performance, having joined the firm in 2014 with nearly 20 years of experience in the financial services industry.

Sharmin Mossavar-Rahmani
CHIEF INVESTMENT OFFICER, GOLDMAN SACHS PRIVATE WEALTH MANAGEMENT

Mossavar-Rahmani's industry expertise and reputation is second to none. Having joined Goldman Sachs as a partner in 1993, she is now responsible for overall strategic asset allocation and tactical investment strategy within the private wealth management group, and continues to be among the few names guaranteed to draw a full crowd at industry events.

Katie Nixon

Rebecca Patterson

Carol Pepper

Susan P. Mucciarone
DIRECTOR OF PRIVATE CLIENT RELATIONSHIP MANAGEMENT, GLENMEDE

A managing director at the firm, Mucciarone leads the company's investment and advisory professionals delivering wealth management services to individuals and families. Prior to Glenmede, Mucciarone served as the executive vice president and senior managing director of Wells Fargo Family Wealth.

Holly Newman Kroft
MANAGING DIRECTOR, NEUBERGER BERMAN

Having begun her career in 1995 as an investment banking analyst at Oppenheimer & Company, Newman Kroft's star has continued to rise. She later moved onto working at several boutique media advisory firms, specializing in private equity transactions, mergers and acquisitions, before joining Neuberger Berman as a wealth advisor in 2005.

Katie Nixon
EXECUTIVE VICE PRESIDENT AND CHIEF INVESTMENT OFFICER, NORTHERN TRUST WEALTH MANAGEMENT

Nixon leads the national investment management practice for Northern Trust's Wealth Management business from the firm's Chicago headquarters. Her responsibilities include investment policy development with a focus on portfolio construction and implementation, and she also directs the investment management activities of over 200 Northern Trust portfolio managers headquarters.

Shelley O'Connor
CO-HEAD OF WEALTH MANAGEMENT, MORGAN STANLEY

Having joined Morgan Stanley in 1984, O'Connor has worked her way through the ranks to lead the wealth management division. From 2004 to 2006, she served as the chief operating officer of the US client coverage group, and subsequently held roles such as chief administrative officer for the firm's wealth management practice and head of field management until 2014.

Rebecca Patterson
CHIEF INVESTMENT OFFICER, BESSEMER TRUST

Patterson joined Bessemer, the world's third largest multifamily office, from J.P. Morgan Chase & Co. in 2012. She has overall responsibility for investments, including asset allocation, strategic portfolio direction, and research at the firm, and is a member of the Federal Reserve Bank of New York's Foreign Exchange Committee.

Adrienne Penta
SENIOR VICE PRESIDENT, BROWN BROTHERS HARRIMAN

Alongside her SVP role, Penta also serves as executive director of the Brown Brothers Harriman (BBH) Center for Women & Wealth (CW&W). Penta led the creation of the CW&W, which provides women with insights, events and an opportunity to engage in a dialogue about making prudent decisions about their wealth.

Nicole M. Perkins

EXECUTIVE VICE PRESIDENT AND MANAGING EXECUTIVE, HAWTHORN, PNC FAMILY WEALTH

As managing executive, Perkins is responsible for business strategy and all facets of the Hawthorn offer, and manages the fiduciary administration of over $1bn for ultra-high net worth individuals and families. Preceding Hawthorn, Perkins served as the market director of fiduciary services in the Philadelphia and Delaware market.

Anne L. Randall

CHIEF FINANCIAL OFFICER AND CHIEF OPERATING OFFICER, BOSTON PRIVATE BANK & TRUST COMPANY

Last April, Randall upped her responsibilities at the bank to encompass the COO role alongside her current position as CFO. Randall oversees the Bank's operations and technology activities while supervising a number of finance, control and support functions within Boston Private, which she joined in 1995.

Michelle Smith

CEO, SMITH FINANCIAL STRATEGIES GROUP

Before starting Source Financial Advisors, Smith was a co-founder and director of Family Wealth Management at Alexandra & James, an independent wealth advisory firm serving clients with $5m-$40m, which she founded alongside Alexandra Lebenthal.

Page Snow

CHIEF PHILANTHROPIC OFFICER, FOUNDATION SOURCE

Snow has served in her current role since 2008, prior to which she was senior vice president of client services. With decades of experience in the charity and foundation sector, Snow possesses unrivalled expertise in an industry where demand for philanthropy and giving is only set to grow.

Susan Sofronas

MANAGING DIRECTOR, GELLER FAMILY OFFICE SERVICES

With more than 25 years of investment experience advising families on all aspects of wealth management, Sofronas specializes in developing, advising, implementing and managing clients' investment portfolios across all asset classes including hedge funds, private equity and real estate.

Robyn S. Transport

MANAGING DIRECTOR, TAG ASSOCIATES FAMILY OFFICE

Nicole M. Perkins

Tracy Warson

Marianne Young

A member of the TAG family office team since its inception in 1983, Transport became a managing director six years later. She serves as the senior TAG advisor to a number of prominent families, overseeing and implementing their comprehensive financial and estate planning affairs.

Loraine B. Tsavaris,

SENIOR CLIENT ADVISOR AND MANAGING DIRECTOR, ROCKEFELLER & CO

Tsavaris is a regular on the family office conference circuit, and frequently provides insightful commentary and insights into the industry. At Rockefeller & Co, she works with affluent individuals, and families in addition to working on growth-oriented initiatives.

Karla Valas

MANAGING DIRECTOR OF THE COMPLEX ASSET GROUP, FIDELITY CHARITABLE

Valas manages a team of attorneys that bring deep knowledge and technical expertise to donors who wish to contribute sophisticated assets, such as privately held C-corp or S-corp shares, to charity.

Jackie VanderBrug

SENIOR VICE PRESIDENT AND INVESTMENT STRATEGIST, U.S. TRUST

An SVP in the portfolio analytics, consulting and institutional group at US Trust, Bank of America Private Wealth Management, VanderBrug is responsible for formulating and developing the firm's values based investing strategy as well as the product offerings across asset classes.

Leslie Voth

PRESIDENT AND CEO, PITCAIRN

Voth has been a member of the multifamily office's senior management team since 1996, and served in several leadership roles including director of marketing, president of the wealth management group, and president and COO from 2008.

Tracey Warson

HEAD OF NORTH AMERICA, CITI PRIVATE BANK

Warson relocated from San Francisco's Bay Area last year to New York when she was promoted to lead the private bank's North American operations.

Marianne Young

PRESIDENT AND CEO, MARKET STREET TRUST COMPANY

Young joined the Market Street Trust Company team in 1995, first as vice president for client services and then as president. In addition to working with the multifamily office's board of directors on strategic issues, Young works with individuals and family groups to facilitate financial and estate planning.