

Sharon L. Klein

Managing Director of Family Office Services & Wealth Strategies

Sharon L. Klein is Managing Director of Family Office Services & Wealth Strategies at Wilmington Trust, NA.

Ms. Klein has over 20 years experience in the area of trusts and estates and is a nationally recognized speaker and author on trust & estate issues. She has spoken for many professional organizations, including the New York University Institute on Federal Taxation, the New York State Society of CPAs, the Notre Dame Estate Planning Institute, the Duke University Estate Planning Conference, the Bloomberg BNA Tax Management Advisory Board, and the Practising Law Institute. Ms. Klein has been featured or quoted in publications such as The Wall Street Journal, The New York Times, The New York Law Journal and Trusts & Estates Magazine.

Ms. Klein serves as Chair of the Trusts, Estates and Surrogate's Court Committee for the New York City Bar Association, a co-Chair of the American Bar Association's "Insurance and Financial Planning" Committee, and is a member of The Rockefeller University Committee on Trust and Estate Gift Plans, the Estates, Gifts and Trusts Advisory Board for The Bureau of National Affairs and the Professional Advisory Council of the Anti-Defamation League.

Prior to joining Wilmington Trust, Ms. Klein was Managing Director and Head of Wealth Advisory at Lazard Wealth Management where she led the delivery of all wealth advisory services, including trusts & estates, tax and philanthropic planning. Prior to Lazard, Ms. Klein headed the Estate Advisement department at Fiduciary Trust Company International. She provided counsel regarding all aspects of domestic and international estate planning and was responsible for overseeing the management of complex trusts and estates. Prior to joining Fiduciary Trust, Ms. Klein was Special Counsel in the Trusts & Estates Department at Rosenman & Colin (now Katten Muchin Rosenman LLP), where she began her career in 1990. There, she advised individuals and families on the preservation, transfer, and management of wealth. Her practice included sophisticated estate and charitable planning and trust & estate administration.

Ms. Klein earned a BA and LLB from the University of New South Wales, Australia, and an LLM from the Boalt Hall School of Law at the University of California, Berkeley.



CONTACT INFORMATION

Wilmington Trust, N.A.

520 Madison Avenue

33rd Floor

New York, New York 10022

Phone | 212.415.0531

Fax | 212.415.0515

Email | sklein@wilmingtontrust.com

EXPERTISE IN

- Complex wealth management solutions for senior executives and ultra-high-net-worth individuals and families
- Sophisticated estate and financial planning
- Philanthropic planning and strategies