

2013 Planned Giving Client Conference

SPEAKER BIOGRAPHIES

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Jere Doyle is an estate planning strategist for BNY Mellon Wealth Management and a senior vice president of BNY Mellon. He has been with the firm since 1981. Jere provides wealthy individuals and families throughout the country with integrated wealth management advice on how to hold, manage and transfer their wealth in a tax efficient manner.

Jere is admitted to practice law in the Commonwealth of Massachusetts and before the United States District Court, United States Court of Appeals (First Circuit) and the United States Tax Court. He formerly served as a member of the Massachusetts Joint Bar Committee on Judicial Appointments. He is the editor and co-author of *Preparing Fiduciary Income Tax Returns*, a contributing author of *Preparing Estate Tax Returns*, a contributing author of *Understanding and Using Trusts* and a contributing author of *Drafting Irrevocable Trusts in Massachusetts*, all published by Massachusetts Continuing Legal Education. Jere is also a reviewing editor of the *1041 Deskbook* published by Practitioner's Publishing Company. Jere is a lecturer in law in the Graduate Tax Program at Boston University School of Law.

Jere received a LL.M. in banking law from Boston University Law School, a LL.M in taxation from Boston University Law School, a juris doctor from Hamline University Law School and a bachelor's degree from Providence College. He is a member of the American Bar Association, Massachusetts Bar Association, Boston Estate Planning Council and the Essex County Bar Association. Jere served as president of the Boston Estate Planning Council and currently serves as a member of its Executive Committee and was a 20-year member of the Executive Committee of the Essex County Bar Association. He was named as the 2009 Estate Planner of the Year by the Boston Estate Planning Council. The National Association of Estate Planners and Councils inducted Jere into the Estate Planning Hall of Fame® and awarded him the Distinguished Accredited Estate Planner® designation. He has spoken at numerous professional education programs throughout the country on various topics, been quoted in numerous business publications and has appeared on CNBC, MSNBC and CNN. Jere teaches in the Graduate Tax Program at Boston University Law School.