

2013 Planned Giving Client Conference

SPEAKER BIOGRAPHIES

George A. Rio

Managing Director

George Rio is the managing director of BNY Mellon Wealth Management's Charitable Gift Services group, which serves the investment, fiduciary and custody needs of planned giving programs nationally. George oversees a team of professionals in the Boston, MA and Greensboro, NC offices and has ultimate responsibility for the successful delivery of services to more than 100 planned giving clients.

Prior to joining the Charitable Gift Services group in 2011, George served as managing director for the firm's Boston-based Family Office Services group, a position he held since 2004. In this role, he provided direct leadership for the group's comprehensive investment, fiduciary and custody services that are provided to family offices. George joined the firm in 2002, as director of product management for the Global Securities Services group. Prior to that, he was executive vice president and director of client services for the Boston Institutional Group, playing a major role in significantly expanding the company's business and in its ultimate sale to The Bisys Group, Inc. Previously, he held executive positions at Putnam Investments and The Boston Company.

George received a bachelor's degree in business administration from Northeastern University. He is a member of the Partnership for Philanthropic Planning.