

2013 Planned Giving Client Conference

SPEAKER BIOGRAPHIES

Erich Smith

Executive Director – Family Office Services

Erich Smith is executive director of BNY Mellon Wealth Management's Family Office Services. In this role, he is responsible for overseeing Family Office and Charitable Gift Services.

Mr. Smith joined the firm in 1993 and has more than 25 years of investment experience. Prior to his current role, Mr. Smith held multiple senior management positions. Most recently, he was president of BNY Mellon Wealth Management's Central Markets region. In this role, he provided direct leadership for financial operations, business growth and client service. He managed the investment management, wealth planning, and private banking services for individuals, families, endowments and foundations for offices in Pittsburgh, Erie, Cleveland, Columbus, Denver and Dallas. Simultaneously, Erich was the national director of wealth strategy for Wealth Management's U.S. markets where he defined and supported the priorities of the national portfolio management business through the leadership of wealth strategists. Before that he served as managing director for expansion markets and head of portfolio management in Western Pennsylvania.

Mr. Smith received a bachelor's degree from Lake Forest College and a master of business administration from Suffolk University. He is a graduate of the National Trust School at Northwestern and is a CFA charterholder.