

Edwin P. Morrow III

Regional Wealth Strategist, East U.S. Region; New York, Cleveland, Columbus, Cincinnati, Nashville, Louisville, Palm Beach and Naples, Florida

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CREDENTIALS

Certified Financial Planner
(CFP®)

Certified Merger and Acquisitions
Advisor (CM&AA®)

J.D., Northwestern School of Law
of Lewis & Clark College,
Portland, Oregon

LL.M, Capital University Law
School, Columbus, Ohio

M.B.A., Xavier University Williams
College of Business, Cincinnati,
Ohio

As a Regional Wealth Strategist, Ed works with local private wealth management teams and their clients throughout the Eastern U.S. With the help of the client's tax and legal advisors, the teams create customized financial and estate plans, helping clients work toward their goals and financial objectives. Financial strategies encompass asset allocation, retirement, education, business succession, asset protection and overall wealth planning.

Additionally, Ed serves as a resource for the U.S. Bank Private Wealth Management teams nationwide and focuses on thought leadership in personal income tax, estate and private business advisory areas. He will often speak at client and professional events, serve as a mentor for other advisors and as a senior resource for complex client situations across the region.

Ed began his career in private law practice focused on tax, trust and estate planning in 1998. Prior to joining U.S. Bank, Ed was at KeyBank where he most recently served as a Director in their Family Wealth Consulting Group.

Ed is a noted author and speaker. This includes co-authoring the 18th and 19th Editions of *Tools and Techniques of Estate Planning*, along with co-authors Steve Leimberg, Paul Hood, Jay Katz and Marty Shenkman. He was recently invited to present at both the 2019 Notre Dame Tax and Estate Planning Institute and 2020 Heckerling Institute on Estate Planning. He is a Fellow in the American College of Trust and Estate Counsel (ACTEC) and a board certified specialist in estate planning, trust and probate through the Ohio State Bar Association. He is on the editorial advisory board of the Probate Law Journal of Ohio.

Ed resides in Springboro, Ohio with his wife and two daughters and when not working Ed enjoys reading history and historical fiction.