AMY ZINSER
WEALTH STRATEGIES ADVISOR



Amy Zinser is a Director and a Wealth Strategies Advisor for the Chief Investment Office (CIO) within Bank of America Corporation. Amy contributes to the CIO's thought leadership and writing in the areas of wealth and estate planning. She also provides in-depth estate plan reviews and crafts customized analysis and strategies for ultra-high net worth clients and their families. Amy collaborates with client teams at Bank of America Private Bank to provide wealth management guidance and help clients pursue their individual goals in financial and estate planning, risk management, wealth transfer, intergenerational planning, and philanthropy.

Previously, Amy was a Wealth Strategies Advisor for Bank of America Private Bank.

Prior to joining Bank of America, Amy was a practicing attorney specializing in complex estate planning and trust and estate administration.

Amy holds a bachelor's degree from Yale University and a JD, with honors, from the University of Connecticut School of Law, where she was Lead Articles Editor for the Connecticut Law Review. Following law school, Amy was a law clerk at the Federal District Court for the District of Connecticut in Hartford. She is admitted to practice in Connecticut and New York. Amy holds the Accredited Estate Planner® designation from the National Association of Estate Planners and Councils.

Amy does not provide legal or tax advice in her role at Bank of America.

Accredited Estate Planner® (AEP®) designation Administered by the National Association of Estate Planners & Councils.

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MITCHELL A. DROSSMAN
HEAD OF NATIONAL WEALTH STRATEGIES



Mitchell A. Drossman is Managing Director and Head of National Wealth Strategies (NWS) for the Chief Investment Office (CIO) within Bank of America Corporation. In this role, Mitchell manages and leads the NWS team in providing objective insight, thought leadership and education to help high net worth clients pursue their wealth and estate planning goals by integrating the full capabilities of our investment and wealth planning services and by utilizing the broad range of Bank of America Corporation and its affiliates. With the team's special emphasis on wealth transfer, philanthropy, business succession, asset holding and location strategies and cash flow analysis, the NWS team provides timely updates and commentary on tax and wealth planning developments. Mitchell also works with individuals, families, closely-held family businesses, family offices and institutions in conjunction with their tax and legal advisors to facilitate wealth transfer, business succession (pre-and post-liquidity event strategies), wealth structuring and estate planning needs that are often complex requiring customized analysis and strategies.

Prior to joining Bank of America, Mitchell was an estate planning attorney with the New York City law firm of ProskauerRose LLP. Mr. Drossman holds a Certified Public Accountant designation and was formerly with Ernst & Young, LLP. Mr. Drossman served on the Advisory Board of Practical Drafting, a highly regarded estate planning publication. He has spoken at numerous seminars including various Estate Planning Councils, New York University's Summer Institute in Taxation (2007-2023), NYS Bar Association's Annual Meeting (2024), NYS Society of CPAs Annual Estate Planning Conference (2022-2023), the UJA-Federation of New York's Annual Estate, Tax and Financial Planning Conference (2011-2013), The College of William & Mary Marshall-Wythe School of Law's Annual Tax Conference (2010 and 2009), and the ACTEC Annual Meeting (2007). Mr. Drossman has often been quoted in various publications, including The Wall Street Journal, Barron's, Forbes, BusinessWeek and The New York Times.

Mr. Drossman is a Fellow in the American College of Trust and Estate Counsel (ACTEC). He has served as a member of the Association of the Bar of the City of New York (and its Committee on Estate and Gift Taxation, 1996-2000), the New York State Society of CPAs (and served as the Chair of the Committee on Income Taxation of Estates and Trusts), the New York State Bar Association (and its Trusts and Estates Section and Estate Planning Committee), the UJA-Federation's Trusts and Estates Specialty Group (and served as Chair from 2009-2011), the Museum of Modern Art's Planned Giving and Advisory Committee and is a member of the Alumni Admissions Board of Brooklyn Law School.

Mr. Drossman received his J.D. cum laude from Brooklyn Law School, where he served as Editor of the Law Review.

Mitchell does not provide legal or tax advice in his role at Bank of America.

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AARON SHAMSHOIAN, CFP®, WEALTH STRATEGIES ADVISOR



Aaron Shamshoian is a Managing Director and a Wealth Strategies Advisor for the Chief Investment Office (CIO) within Bank of America Corporation. In this role, Aaron keeps abreast of changes in the law and planning strategies that may affect clients and assists in the preparation of materials on various estate and tax planning ideas that support Bank of America Private Bank including financial, tax and estate planning strategies for ultra-high net worth clients and their families.

Previously as a Wealth Strategies Advisor within the Private Bank, he helped clients pursue their financial goals by providing personalized strategies in the areas of financial planning, estate planning, risk management, and philanthropy for Bank of America Private Bank. In that role, Aaron also coordinated with the client's team of advisors to oversee and implement the recommended planning solutions.

Aaron began his career as a portfolio accountant in Deutsche Bank's Private Investment Counsel group.

Aaron earned his B.A. degree in Economics and International Studies from American University in Washington, DC. He holds the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification.

Aaron does not provide legal or tax advice in his role at Bank of America.

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