

RAMSAY H. SLUGG, NATIONAL WEALTH PLANNING STRATEGIST



Ramsay H. Slugg is managing director and a national wealth planning strategist at U.S. Trust, Bank of America Private Wealth Management. In this role, Ramsay keeps abreast of changes in the law and planning strategies that may affect U.S. Trust clients, and assists in the preparation of materials on various estate and tax planning ideas that are used by our associates and their clients including financial, tax and estate planning solutions for our ultra-high net worth clients and their families. Ramsay has been instrumental in building financial, retirement and tax plans and crafting creative plans that deal with complex tax, financial and family issues for select ultra-high net worth clients. He is also the author of the 2014 *Handbook of Practical Planning for Art Collectors and Their Advisors*, published by the American Bar Association and serves as the national lead for art planning within U.S. Trust's Art Services offering for collectors and institutions.

Prior to joining U.S. Trust, he was the National Practice Director of Bank of America's Philanthropic Management group. In that capacity, he was involved in both client and internal strategic planning and product development for the Bank's charitable practice. He has also served as the Central Region Director of the Bank's Charitable Management Services Group, and the Central Region Director of the Wealth Management Consulting Group. Mr. Slugg was an adjunct professor at Texas Christian University, teaching courses in Introductory and Advanced Federal Income and Estate Taxation. He is a frequent speaker on tax and financial planning topics.

Ramsay received his J.D. degree from the Ohio State University College of Law, and his undergraduate degree from Wittenberg University. Mr. Slugg is admitted to practice law in Texas, is a member of the State Bar of Texas, Tarrant County Bar Associations, the Tax and Estate Planning Section of the Tarrant County Bar (Chair, 1999-2000), the Lone Star Chapter of the Partnership for Philanthropic Planning, and the College of the State Bar of Texas.

Ramsay does not provide legal or tax advice in his role at U.S. Trust.

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