

FABIO CONCESI

Managing Director, International Wealth Strategist
Strategic Wealth Advisory Group



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Fabio Concesi is a Managing Director and International Wealth Strategist in the Miami office of Merrill's Strategic Wealth Advisory Group and a member of the Merrill's Center for Family Wealth™ team.

He advises global clients with interest in estate and other wealth planning services. In addition, he provides cross-border advice to domestic and international clients, all in conjunction with financial advisors. Fabio is also involved in training and education on legacy planning topics for Merrill financial advisors and the rising generation of clients.

With the emergence of the fourth-culture generation in ultra-high net worth families, Fabio's multicultural background and in-depth knowledge of cultural intelligence on how to communicate and work through cultural differences is considered an important strength for our global clients.

Fabio is an Attorney at Law (Brazil) and holds a post-graduate degree in international tax law from the University of Barcelona.* He is a founding member of the Society of Trust and Estate Practitioners (STEP) in Brazil and is currently serving as Vice-Chair of STEP Miami branch.

Fabio is fluent in Portuguese, English and Spanish. He holds the Series 7 and 66 FINRA registrations.

Education | Designations | Licenses | Memberships

- Post-Graduate in International Tax – Spain
- Law degree – Brazil
- Attorney (Brazil)*
- Society of Trust and Estate Practitioners, Founding Member of the Brazil Branch
- Board member of Society of Trust and Estate Practitioners, Miami Branch

**Members of the Strategic Wealth Advisory Group do not provide tax or legal advice.*

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