[BIOGRAPHY]

Thomas C. Rogerson

Senior Managing Director and Family Wealth Strategist

As a recognized leader and pioneer in family governance, Tom introduces clients throughout the U.S. to his "5 Steps to Healthy Family Governance," which assists families with communication, philanthropic vision, legacy planning, succession, and education. Tom incorporates these critical issues into a client's comprehensive wealth management plan, not only helping to prepare the money for the family, but to also prepare the family for the money.

Tom joined Wilmington Trust in 2011 with more than three decades of experience in the wealth management industry. For over a decade, Tom has provided guidance and education to help prepare families as wealth is transitioned from generation to generation. He most recently served as managing director of family wealth services for BNY Mellon wealth management. Previously, he was national director of estate tax planning with State Street Global Advisors in Boston, assisting clients with estate planning and family governance. Earlier in his career, Tom served as director of financial and estate tax planning with Coopers and Lybrand and was national director of estate tax planning for Kidder, Peabody & Co. He holds a bachelor's in Economics from Ithaca College.

Tom is an international speaker on the topic of family governance and continues to be invited to speak to wealthy individuals and entrepreneurs around the world. Engagements include: Dallas Theological Seminary, Tiger 21, Lincoln Center, Yale University, Vistage, Museum of Modern Art, Commonwealth Club, The Nature Conservancy, New York Botanical Garden, The Young Presidents Organization, The World Presidents Organization, Harvard University Business School, National Society of Fund Raising Executives, Council for Advancement and Support of Education, Family Office Symposiums, The Dallas Foundation, The New York Community Trust, The Boston Foundation, Brigham Young University, The Woodland Park Zoo, numerous Family Office Conferences and Symposiums, as well as many other organizations.

CONTACT INFORMATION

Atlantic Wharf
280 Congress Street, Suite 1300
Boston, MA 02210
Phone | 617.449.3391
Fax | 617.457-2001
Email | trogerson@wilmingtontrust.com

EXPERTISE IN

- Strategies for managing family wealth
- Legacy planning
- Family governance
- Family education and communication
- Philanthropic planning