Michael F. Burke

CAREER HISTORY

1998-2016 *Senior Vice President, United States Trust Company*
New York, NY

Senior Trust Officer
-Served 99 Families with over 375 accounts $750m.; many with 3-4 generations dating to the 1930's
-Administered Testamentary and Inter-Vivos Trusts; Generation Skipping Transfer Tax Exempt; Marital, Credit Shelter, Charitable Lead and Remainder; Roth and Traditional IRA's; Life Insurance/Wealth Replacement Trusts; Gifting
-Provided Financial Planning, Estate Planning, Cash Flow, Retirement and Insurance Analysis to individual investors and beneficiaries

Wealth Strategist
-Analyzed Wealth Structures for wealthy investors and made recommendations for diversification of low cost concentrated holdings through the use of LLC's, Prepaid Variable Forward Contracts; Family Limited Partnerships

Fiduciary and Financial Planning Manager
-Reviewed and approved discretionary principal and income distributions, and Uniform Principal and Income calculations for 15 Trust Officers in the New York Headquarters of U.S. Trust
-Reviewed and approved Cash Flow, Trust Provisions and Retirement analysis for accounts for the New York Headquarters of U.S. Trust

Manager of Client Relationships
-Managed division of trust officers, portfolio managers and support staff with $3.2b. in assets under management; generating $18m. in annual revenues. Operating officer responsible for setting division policy, risk management,

International Forecasting (continued)

business development, hiring, training and assignment of accounts to eleven CFA, CFP, CPA, JD or CTFA professionals and six support staff.
-Provided financial planning and fiduciary services to 25, more complex, relationships, throughout U.S.
-Generated new, recurring fees of $50-$100M per annum
-Developed career paths for trust officers and support staff throughout the firm
-Served on Design Committee for financial planning lifestyle analysis and personal wealth solutions financial planning applications
-Co-ordinated annual audits by Deloitte Touch for SAS 70"s

1991-1998 *Vice President, The Chase Manhattan Bank*
New York, NY

<u>Personal Financial Planner</u>
-$300-$400M in new annual fees per year
-Designed Estate and Financial Plan with Partners at Price Waterhouse
-Trained and groomed new officers in Trust and Investment Management business development
-Managed units effort in retaining distributions from trust terminations in the Private Bank
-Sourced business through 100 offices in the Personal Banking division, and 20 branches
-Cultivated members of the Legal and Accounting communities as Centers of Influence
-Liaison for senior and middle management and compliance counsel, asserting viability of department, subsequent to merger with Chemical Bank

<u>Investment Specialist</u>
-Unit Investment Trust, Mutual Fund, Annuity and Life Insurance Sales
-Full compliment of ERISA plans, including Defined Benefit

International Forecasting (continued)

-$700,000 plus average monthly investment
-$25M-$35M average monthly fees

1991-1998 *U.S. Marketing Manager, International Forecasting Corporation*
Stamford, CT
-Marketed momentum analysis to U.S. Corporate Treasury managers and Portfolio Managers
-Set limits, weekly, for over 200 Currency, Interest Rate, Stocks and Stock Indices and Hard Commodities Markets

1982-1988 *Assistant Vice President, First Fidelity Bank*
Newark, NJ
-Developed Personal, Employee Benefit and Corporate Trust business
-$40M current fee business; $15m. Future fee appointments

1979-1982 *Registered Representative, Investors Diversified Services*
Fair Lawn, NJ
-Mutual Fund, Annuity, Unit Investment Trust, Limited Partnership and Life Insurance Sales
-Generated $1.2m. In investments in 15 months; $35M in recurring fees

EDUCATION

University of Dayton, Bachelor of Arts

PROFESSIONAL CREDENTIALS

Accredited Estate Planner (AEP); Certified Financial Planner (CFP); Certified Trust and Financial Advisor (CTFA); (formerly held NASD Series 7, 24, 63-no longer current)

International Forecasting (continued)

MEMBERSHIPS and Awards

Estate Planning Council of New York City (served as board member 2011-2014); Certified Financial Planner (served on panel to select 500 questions used for the CFP Exam) National Association of Accredited Estate Planners; American Bankers Association; Financial Planning Association-America's Top Financial Planners 2012