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Andrew Tanner is a Managing Director of Bank of America's Specialty Asset Management team. In this role, Andrew focuses on advising clients with material specialty asset wealth and business owners as they consider wealth planning and transfer. He also serves as fiduciary expert in the oversight of specialty assets in fiduciary settings, speaks at industry gatherings and provides continuing education to firms engaged in wealth planning and business succession.

At Bank of America, Andrew led the management of closely-held assets held in trusts & estates from 2004 – 2025 and real estate from 2012-2021. Prior to joining Bank of America, Andrew served as Director of Specialty Assets and Fiduciary Investments for First National of Nebraska and as a regional manager covering closely held assets and ESOPs for a large regional bank in the Midwest.

Andrew earned his B.B.A in Management from Tiffin University, and a M.B.A. from The Ohio State University. He holds the Chartered Financial Analyst (CFA®) designation as well as earning the Certified Exit Planning Advisor (CEPA®) designation in 2017.

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