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Lee Ritter

Executive Director

Closely Held Asset Management and Real Estate Practice Leader

Lee Ritter is an Executive Director and Practice Leader for the Closely Held Asset Management (CHAM) and Real Property Asset Management (RPAM) Groups within the Trusts & Estates Team at J.P. Morgan Private Bank. In this capacity, Lee oversees a team managing over \$7 billion in closely held and real estate investments.

The CHAM Group specializes in managing privately held businesses, partnerships, limited liability companies, and other closely held assets within the trusts and estates of J.P. Morgan Private Bank clients. The team is actively involved in fiduciary and business matters, including attending shareholder meetings, serving on boards of directors, acting as officers or managers, and conducting due diligence on managed investments.

The RPAM Group provides comprehensive property management services for a diverse range of properties held in trust and estate accounts at J.P. Morgan. These properties include single and multi-family residential, office, industrial, mixed-use, farm and ranch, retail, and vacant land. The team of real estate professionals assists with property management tasks such as acquiring, selling, and leasing assets, ensuring proper insurance coverage, coordinating routine maintenance and capital improvements, and directing regular inspections and appraisals. They also develop strategies for risk mitigation, environmental compliance, capital planning, and the prudent oversight of legacy assets across multiple generations.

With over 19 years of experience in the trusts and estates industry, Lee joined J.P. Morgan in 2004 through the Bank's Corporate Development Program and served as a Project Manager for bank mergers before joining J.P. Morgan's Specialty Asset Group in 2006.

Lee holds a B.S. in Business Administration from Miami University. He is a Certified Trust and Financial Advisor through the American Bankers Association's Institute of Certified Bankers and has served as Vice President of the National Trust Closely Held Business Association.

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