

Wealth Planning Under the Biden Administration



Nancy Kistner

Nancy A. Kistner, CFP® is a Managing Director and a Wealth Strategy Executive at Bank of America Private Bank. In this role, she is responsible for managing a team of wealth strategists for the Northeast region including the DCMV Market and the Wealth Strategy Business Support Team. The team offers high net worth clients cash flow and lifestyle planning, trust, gift and estate tax planning, charitable giving strategies, retirement planning, risk management, business succession, concentrated stock management, asset location and asset preservation strategies. She provides personalized strategies by leveraging the Private Bank's broad range of investment management services and Bank of America affiliates. Nancy focuses on helping lead the Private Bank's women and wealth focus, serving high net worth women experiencing life transitions and those in need of legacy planning as well as eldercare planning.

Prior to joining Bank of America Private Bank, she served as Head of Financial Planning at the Citi Private Bank where she managed a team of financial planning professionals and delivered complex financial, trust and estate planning advice to high net worth individuals and families. Previously, she also served as Head of Financial Planning Training at MetLife Financial Services.

Nancy earned her B.A. degree in Economics from the University of California, Los Angeles (UCLA). She holds the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification. She serves on the Board of Directors of the Financial Planning Standards Board Ltd. (FPSB) which establishes, upholds and promotes worldwide professional standards for financial planning to foster public confidence in the financial planning profession. She also served on the Board of Directors of the Certified Financial Planner Board of Standards, Inc. in the United States and was the Chair of the Board in 2013. She is the Founder and Chair of the CFP® Board's Women's Initiative, the WIN Advisory Council.

Nancy does not provide tax advice in her role at Bank of America Private Bank.