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Julie is a Managing Director and Senior Trust officer with Bank of America Private Bank in Boston, Massachusetts. In this role, Julie is involved with advising individuals and families on a broad spectrum of wealth planning topics with a focus on estate planning and fiduciary administration. Julie joined Bank of America Private Bank (formerly U.S. Trust) in 2009 and has spent time in both at the Fiduciary Division as a Trust Officer and the Wealth Strategies Division as an analyst. In both capacities, Julie has provided technical advice in relation to estate planning and taxation, sophisticated gifting strategies, income tax projections and financial modeling. She holds the CERTIFIED FINANCIAL PLANNER™ certification, the Certified Trust and Fiduciary Advisor (CTFA) designation, and is a member of the Boston Estate Planning Council. Julie received her bachelor's degree in trust and wealth management, with a minor in financial planning. She received her MBA from Campbell University with a concentration in investments. Julie serves on the council's Diversity, Equity, Inclusion and Belonging Committee.