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2020

FORTY UNDER 40

A PROGRAM OF NJBIZ

Celebrating the Young Professionals

PATH TO SUCCESS

In the New Jersey Business Community

JONATHAN PUESCHEL

Executive Director
J.P. Morgan Private Bank
Summit, Union County



Job function: Works with a team of professionals to advise on asset allocation, portfolio construction, capital and liquidity strategies and wealth transfer opportunities and execution. In addition, he leads the New Jersey Advisor team working with high net worth families.

What drives you in your career? My family; I have two little girls (ages 3 and 1), and nothing motivates me more than trying to provide for them while also teaching them the values of hard work and lifelong learning.

Who has been your most influential role model? My father has always been the most influential role model in my life. He taught me the importance of integrity, respect, compassion, hard work, determination and learning, all while enjoying life with a little bit of humor.

What was the best business advice you ever received? My close partner Peter always reminds me that you catch more bees with honey, and you can be successful while still treating people the way you want to be treated.

Other than financial reasons, what inspires you to continue in your current profession? The markets and this industry are constantly changing, and it's more apparent now than ever that there is a significant need for financial education across all demographics. I have a passion for person finance and love being an advisor, teacher (and sometimes therapist) to our clients who are some of the most successful and prominent families in the country. Regardless of their background, we always find opportunities to add value and advise.

40

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MARYANN ZALESKI ROMANO

Executive Director
J.P. Morgan Private Bank
Summit, Union County



Job function: Responsible for advising many of the region's most prominent ultra-high net worth individuals and their families on all critical aspects of their wealth.

What drives you in your career? I work in an industry that is intellectually stimulating and never gets boring. I also consider myself incredibly fortunate to have a career where I have the opportunity to build strong relationships with incredible people. Each day I spend my time working with super smart, successful and interesting clients. While I provide advice and service, I have grown by also learning from them.

What is your greatest professional achievement so far? Joining our New Jersey team in 2015 to help our expanding market. The team was in need of some experienced bankers so I signed up for the challenge. Five years later I have forged some of my best client relationships and friendships with internal colleagues.

Who has been your most influential role model? My father. He has been a small business owner for the past 40 years. Watching him work so hard in order to provide for our family was an inspiration to me. We have a wonderful relationship and I regularly seek his guidance and advice.

What was the best business advice you ever received? A colleague told me early in my career, "Always put the client first." If you do that, everything else will fall into place.

What do you know now that you wish you'd known earlier in your career? Try not to rush time and enjoy every phase of your working career.