

CRAIN'S

CLEVELAND BUSINESS

November 8, 2021

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NOTABLE

WEALTH

MANAGERS

Our 46 Notable Wealth Managers differ in title and style, but share the same goal of providing ethical, honest and productive financial management and financial planning.

Their journeys began in places as varied and distant as Australia and Pakistan. They devote their free time to helping schools, foundations, women's groups and the arts. They specialize in wealth management and financial planning, and carry titles that include president, founder, chief experience officer, chair and CEO. They coach advisors, manage mutual funds and are partners in various financial entities. They work for firms they founded, and for large banks and money management companies.

One nomination form described an advisor in a way that can apply to all: The honored individual has the ability "to understand the risk/reward of a given situation and the information needed to optimize that situation."

David Allen

Executive Director and Cleveland Team Lead
J.P. Morgan Private Bank

David Allen's experience with a broad range of investment firms from McDonald & Co. to Goldman Sachs and J.P. Morgan has given him a keen sense of how to deliver global investments to a local market.

Within each firm, he's achieved increasing responsibility, including management roles that required a high degree of problem-solving.

According to the nomination, "Attention to detail, problem solving and ability to maintain sustained levels of mental energy developed through years of high-altitude mountain climbing. He brings these unique characteristics and background to deliver differentiated results to his customers and team members."

Allen manages professional advisors and specialists dedicated to designing strategies that help families plan, invest, bank and borrow. He's particularly focused on helping executives, entrepreneurs and business owners unlock the value of their concentrated wealth.

He sits on the Rocky River Planning Commission, is part of the American Heart Association Greater Cleveland Heart Walk Executive Leadership Council and is co-chair of the JPMorgan Chase Market Leadership Team, which connects business lines in efforts to be a positive corporate citizen in the region.

"A native of Cleveland, he delivers a local presence, extensive industry experience and the global capabilities of J.P. Morgan," the nomination stated.



— Lydia Coutré

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Ryan Giacomarro

Ohio Market Manager and Managing Director
J.P. Morgan Private Bank

Boasting a quarter-century of industry experience, Ryan Giacomarro understands the challenges of running a complex organization.

Giacomarro joined J.P. Morgan in July, and now drives the private bank's ambitious growth strategy across Ohio. In Cleveland, Giacomarro oversees a total of 50 advisors and support staff in the company's Ohio footprint.

Giacomarro is a believer in a "One Ohio approach," meaning a single team working from multiple locations and united in a singular vision. This collaboration illuminates J.P. Morgan's strengths in intellectual capital, investment and commercial banks, and sophisticated wealth management, the nomination said.

Before arriving at J.P. Morgan, Giacomarro was instrumental in the expansion and evolution of investment banking company UBS. Through this work, Giacomarro spread his strong management capabilities across products, sales, operations and markets. An influential leader, he also held senior management roles in New Jersey and North Carolina.

Outside the office, Giacomarro is an active member of the Cleveland Clinic Children's Hospital leadership council and the Villanova alumni association. In his free time, he enjoys golf, physical fitness and spending time with his daughter.



— Douglas J. Guth

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