Guthrie places an emphasis on guiding highly accomplished individuals, executives, entrepreneurs and multi-generational families in formulating comprehensive plans for their wealth. A thoughtful advisor, she is passionate about being a strategic partner to her clients and works tirelessly to get to the heart of what really matters.

What do you consider to be your greatest contribution to the growth and profitability of your company/clients? The complexities of a career in asset and wealth management are vast, from the ever-changing aspect of markets to the intimate nature of people and their finances. The ability to empathize and truly work to understand the experiences and emotions of the moment I believe is my greatest contribution to our business.

What do you enjoy most about your career? Having the opportunity to be challenged every day, often in ways that are unexpected, is incredibly rewarding. I have always viewed this as an incredible opportunity to be intellectually curious, to be motivated to expand my thinking, and ultimately to grow.

In what ways have you seen your role as a “financial executive” evolve? The wealth management industry has been one of the most dynamic within financial services. As the needs (and requirements) of customers continue to evolve, the challenge we face within our industry is to adapt to provide relevant and timely advice in an increasingly real-time world. This requires constant innovation and a willingness to introduce new ideas.

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Peter Donchez
MANAGING DIRECTOR, GLOBAL INVESTMENT SPECIALIST
J.P. Morgan Private Bank

With a career spanning over a decade, Donchez has become one of the most prominent financial advisors to New Jersey’s wealthiest families and foundations on a range of financial matters including asset allocation, portfolio construction, cash flow and liability planning. As of January 2023, he oversees $6 billion in assets and liabilities on behalf of his clients.

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Jennifer Guthrie
EXECUTIVE DIRECTOR
J.P. Morgan Private Bank

Guthrie places an emphasis on guiding highly accomplished individuals, executives, entrepreneurs and multi-generational families in formulating comprehensive plans for their wealth. A thoughtful advisor, she is passionate about being a strategic partner to her clients and works tirelessly to get to the heart of what really matters.

What do you consider to be your greatest contribution to the growth and profitability of your company/clients? Both dedication and strategic partnership with clients, and a focus on the growth of our broader team. This dedication has led to asset growth by 35 percent in the last three years. I feel at my best and enjoy my work the most when I am able to help my clients achieve both their personal and financial goals.

What do you feel is the biggest misconception about your career? To me, one of the biggest misconceptions we face is a concern that advisors are commission hungry, but what we really do is lead with advice. If we do right by our clients, that will drive growth over time for both clients and our business.

What do you enjoy most about your career? My favorite moments have included helping a business founder open their first investment account and then seeing them through IPO and helping next generation investors with everything from buying their first stock to building a diversified portfolio. I also thoroughly enjoy developing junior talent and future advisors, seeing them flourish in our business and have success with clients.