

Business Leaders of South Florida



As the Head of the Southeast for J.P. Morgan Private Bank, Simon Levine doesn't miss a beat when it comes to explaining why he and his team are thriving in Florida, one of the country's fastest-growing regions.

"We don't ever get comfortable," he says. "For example, we're focused on evolving our technology so we can better serve clients and protect our clients' wealth. We're always re-evaluating trends and adjusting our services to meet our clients' needs and goals."

Having spent the first few years of his career in private legal practice, Simon now uses his unique experience in law and finance to help his clients navigate the nuances of the financial services sector. Today, Simon and his teams provide wealth management and financial services to individuals, families and foundations throughout Miami, Naples, Palm Beach, Boca Raton, Tampa, Fort Lauderdale, Sarasota and Orlando. Moreover, Simon expects their footprint to expand in 2022.

"It's important for us to live and work in the same cities where our clients live and work. We volunteer, participate and provide financial support so our communities can thrive," he says. "Florida is an incredible place to live, and we make sure our clients have access to a set of services that have been uniquely designed to meet their needs."

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