

GREENWICH

LIFE TO LIFESTYLE SINCE 1947

J.P. MORGAN PRIVATE BANK

INNOVATING IN WEALTH FOR OVER 20 YEARS



Ian Dilts, Mariah Sawyer, Brian Bisesi

delivering enhanced technology, and providing industry leading advice across an expanded demographic. We are fortunate to have access to the considerable resources that only J.P. Morgan can offer, and still retain a boutique like approach to client service.”

The J.P. Morgan team excels in helping clients create a custom financial plan that can help them achieve their goals and fulfill their vision for their family, community, and beyond. The team will constantly monitor, advise and deliver insights in real-time as clients build, manage and grow their wealth. Additionally, the team delivers expert planning and advice to help shape the course of a client’s life,

business and legacy.

Within the community, J.P. Morgan is involved with many cultural, economic and philanthropic organizations across Connecticut. The Private Bank has partnered with The Greenwich Economic Forum, Greenwich International Film Festival, Breast Cancer Alliance, and LiveGirl, among other prominent civic organizations. Engagement ranges from board participation, volunteering, and mentorship.

“It’s incredibly important to us in the Private Bank to be involved in our communities and give back; it is in our DNA as a firm to support local nonprofits and invest in our communities,” added Brian.

J.P. Morgan, one of the world’s most significant and best-known financial institutions has deep rooted ties to Connecticut. The firm’s founder, John Pierpont Morgan, was born, raised and rests in the state. For nearly 200 years, J.P. Morgan has provided its clients with comprehensive solutions to their financial needs.

Located in the heart of Greenwich, J.P. Morgan Private Bank has been serving the community for more than 20 years. The Private Bank first opened its doors in July of 2002 with approximately 20 professionals. The business has seen substantial growth, expanding to over 100 bankers and \$75 Billion of client assets. The team on the

ground in Greenwich delivers a full suite of investment, banking and credit solutions.

“Our clients are looking for integration across banking and wealth management services all delivered in a personalized way. Many of our Greenwich based clients also do business with the firm in other channels – namely with our commercial or investment bank as part of their professional life. We differentiate in our ability to deliver the entire firm to our client base in a sophisticated and holistic way where we are all connected across business lines,” said Brian Bisesi, Managing Director, Head of the East Region for J.P. Morgan Private Bank. “We are committed to continued innovation,