



Emily Brunner

Executive Director

Wealth Advisor

Emily Brunner is an Executive Director and Wealth Advisor in the New York office of J.P. Morgan Private Bank. Emily engages with some of the firm's most significant clients to open up the breadth of opportunities derived from strategic wealth management and tax-driven estate planning.

Intentional family wealth structuring is at the core of Emily's work, and she partners with clients in the many areas that make up a successful plan. Her conversations range from basic testamentary documents to the most cutting-edge techniques, from insurance and creditor protection to personal and philanthropic giving. Emily places family, legal and tax considerations in the context of the existing structure. She then focuses on ensuring that current and future family vehicles are as creative, flexible and targeted as possible.

Emily is advisory-driven and strategy-focused. She hears and reflects back clients' aspirations, establishes recommendations for pursuing them, and simplifies complex topics. She helps families meaningfully understand their plans so that they may be good stewards of the assets. Emily brings the best of J.P. Morgan to clients by seamlessly incorporating estate considerations into the investment experience so that each may enhance the other.

With a legal and finance career spanning over 15 years, Emily came to J.P. Morgan from UBS Financial Services Inc. There, she worked with ultra-high-net-worth clients to understand and refine their family wealth goals. Prior to that, Emily practiced law at Roberts & Holland LLP, a prominent New York firm focused exclusively on tax and estate planning. Her recent legal scholarship includes articles on investing for trusts and trust optimization over time. She is a member of the New York State Bar Association.

Emily earned her J.D. and LL.M. in Taxation from New York University School of Law, and received her B.A. in Comparative Literature, magna cum laude, from Dartmouth College.

A lifelong New Yorker, Emily lives in Brooklyn with her husband and three young children.

J.P. Morgan Private Bank
390 Madison Avenue, Floor 23

New York, NY 10017
jpmorgan.com/privatebank

Phone
212.464.1283

Email
emily.brunner@jpmorgan.com

**INVESTMENT AND INSURANCE PRODUCTS: • NOT A DEPOSIT • NOT FDIC INSURED
• NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NO BANK GUARANTEE • MAY LOSE VALUE**

JPMorgan Chase Bank, N.A. and its affiliates (collectively "JPMCB") offer investment products, which may include bank-managed accounts and custody, as part of its trust and fiduciary services. Other investment products and services, such as brokerage and advisory accounts, are offered through **J.P. Morgan Securities LLC** ("JPMS"), a member of FINRA and SIPC. Annuities and other insurance products are made available through Chase Insurance Agency, Inc. (CIA), a licensed insurance agency, doing business as Chase Insurance Agency Services, Inc. in Florida. JPMCB, JPMS and CIA are affiliated companies under the common control of JPMorgan Chase & Co. Products not available in all states.

"J.P. Morgan Private Bank" is a brand name for private banking business conducted by JPMorgan Chase & Co. and its subsidiaries worldwide.



J.P.Morgan

PRIVATE BANK



Zach Chafitz, CFA[®]

Executive Director

Investment Specialist

Zachary is a senior Investment Specialist at J.P. Morgan Private Bank. His clients include senior executives, business owners, real estate professionals and entrepreneurs.

Zach has extensive experience advising ultra-high net worth clients on all aspects of investments, including building customized strategic portfolios and capitalizing on tactical ideas across both public and private markets. Zach works with his clients to achieve specific goals and address complex challenges while integrating investment advice with estate planning, philanthropy, and tax considerations.

Zach holds a Bachelors of Science Honors degree in Business Administration from the University at Delaware and has over 12 years of financial services experience. Before working with individual clients, Zach spent three years working for the Private Bank's U.S. Chief Investment Strategist, where he was responsible for research, tactical asset allocation and portfolio construction. He also has experience with discretionary equity management and risk analytics. Zach holds his Series 7 and 63 licenses from the National Association of Securities Dealers and is a CFA Charterholder.

Zach lives in Hoboken with his wife, daughter and newborn son. When not at work, Zach enjoys tennis, basketball and travel.

J.P. Morgan Private Bank

390 Madison Avenue
New York, NY 10017

jpmorgan.com/privatebank

Phone

212.464.1018

Email

Zachary.m.chafitz@jpmorgan.com

CFA[®] and Chartered Financial Analyst[®] are registered trademarks owned by CFA Institute.

**INVESTMENT AND INSURANCE PRODUCTS: • NOT A DEPOSIT • NOT FDIC INSURED
• NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NO BANK GUARANTEE • MAY LOSE VALUE**

JPMorgan Chase Bank, N.A. and its affiliates (collectively "JPMCB") offer investment products, which may include bank-managed accounts and custody, as part of its trust and fiduciary services. Other investment products and services, such as brokerage and advisory accounts, are offered through J.P. Morgan Securities LLC ("JPMS"), a member of FINRA and SIPC. Annuities and other insurance products are made available through Chase Insurance Agency, Inc. (CIA), a licensed insurance agency, doing business as Chase Insurance Agency Services, Inc. in Florida. JPMCB, JPMS and CIA are affiliated companies under the common control of JPMorgan Chase & Co. Products not available in all states.

"J.P. Morgan Private Bank" is a brand name for private banking business conducted by JPMorgan Chase & Co. and its subsidiaries worldwide.



Hank Snyder

Executive Director

Senior Private Banker

Hank Snyder is an Executive Director and Senior Private Banker at J.P. Morgan Private Bank where he is a trusted advisor to complex multi-generational families, individuals, entrepreneurs, public and private company executives, philanthropists, and endowments and foundations with regard to the broad spectrum of asset management, including investment and asset allocation advice, lending, trust services, banking and cash management, and related financial modeling and forecasting. Hank works closely with his clients and their advisors to manage their assets and liabilities across their balance sheet.

J.P. Morgan Private Bank

390 Madison Avenue, Floor 23
New York, NY 10017

jpmorgan.com/privatebank

Phone

212.464.0168

Email

henry.snyder@jpmorgan.com

Hank is President of the Estate Planning Council of New York City, and is a Member of the Society of Trusts and Estates Practitioners and the Family Firm Institute. He is a Trustee of the New York Academy of Art, and a former Trustee (2007-2017) of Choate Rosemary Hall. He regularly is a speaker and moderator on relevant topics to asset and wealth managers, including, most recently, on impact investing and fiduciary duty, and the intergenerational conflict between Gens Y and Z and older generations in the purpose and mission of trust or endowment/foundation investments.

Hank has a sophisticated understanding of corporate governance, risk management and fiduciary obligations. Prior to working in private banking and investment management, Hank was a senior securities litigator at law firms Pillsbury Winthrop and Bryan Cave where he specialized in representing public companies under investigation by regulatory authorities, usually the Securities and Exchange Commission.

Hank received his B.A. from the University of Pennsylvania and his law degree from the University of Connecticut School of Law, where he was an Editor of the Law Review.

**INVESTMENT AND INSURANCE PRODUCTS: • NOT A DEPOSIT • NOT FDIC INSURED
• NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NO BANK GUARANTEE • MAY LOSE VALUE**

JPMorgan Chase Bank, N.A. and its affiliates (collectively "JPMCB") offer investment products, which may include bank-managed accounts and custody, as part of its trust and fiduciary services. Other investment products and services, such as brokerage and advisory accounts, are offered through J.P. Morgan Securities LLC ("JPMS"), a member of FINRA and SIPC. Annuities and other insurance products are made available through Chase Insurance Agency, Inc. (CIA), a licensed insurance agency, doing business as Chase Insurance Agency Services, Inc. in Florida. JPMCB, JPMS and CIA are affiliated companies under the common control of JPMorgan Chase & Co. Products not available in all states.

"J.P. Morgan Private Bank" is a brand name for private banking business conducted by JPMorgan Chase & Co. and its subsidiaries worldwide.