



Christopher P. Siegle
Wealth Advisor
Private Bank

Chris Siegle, Executive Director and Wealth Advisor, joined the J.P. Morgan Private Bank in 2010 after practicing trust and estates, employee benefits, and corporate transactions for 13 years with a large Phoenix firm. He is a member of the State Bar of Arizona, the Maricopa County Bar Association, Planned Giving Council of Southern Arizona, the Central Arizona Estate Planning Council, Valley Estate Planners, and the U.S. Tax Court. He is active with the Arizona Community Foundation and the Catholic Community Foundation.

He is part of the Wealth Advisory team at J.P. Morgan. He advises clients in all areas of wealth planning, including retirement needs, planning for children and grandchildren's educational needs, estate planning, and passing wealth to charity. Chris is responsible for trust matters in Arizona and Nevada.

Chris frequently speaks and writes on topics related to tax planning, charitable giving, investments and estate planning strategies. He has spoken at the Phoenix Chapter of CEBS, Arizona Society of Human Resource Management, Employment Law and Legislative Conference in 2006, 2007, and 2009, and other seminars. He has authored publications for *Naval Institute Proceedings* regarding use of Navy Reserve for Homeland Defense (2010); the Arizona Community Foundation Giving Counsel newsletter on Asset Protection of Tax-Deferred Vehicles (May/June 2010); a chapter in *Aspatore Books' "Inside the Minds: Family and Business Succession Planning, 2010 ed."* (2010); an article in the AZ Society of CPAs magazine on IRAs, qualified plans and annuities vs. creditor claims (September 2010); the Arizona Community Foundation Giving Counsel newsletter article on use of S Corps in Estate Planning (May/June 2011); the Utah Association of CPA's Journal Entry magazine on Estate Planning with S. Corps (July 2011); and the Arizona Attorney Magazine on timely sale of small businesses (September 2012).

Chris holds a Bachelors of Arts degree from the University of Illinois in Champaign, Illinois, J.D, with honors from the University of Tulsa College of Law, and a Masters of Strategic Studies degree from the U.S. Army War College. He is a Captain in the United States Navy Reserve and has served since 1990.

Chris is married with 2 children. He is very involved with coaching baseball and other community activities.

EDUCATION

M.S.S. • Master of Strategic Studies • U.S. Army War College (2011)

J.D. • University of Tulsa College of Law (1997)

A.B. • Liberal Arts/Political Science • University of Illinois (1990)

CONTACT INFORMATION

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