JEAN Y. KIM-WALL

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Wealth Strategist

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Jean has advised ultra-high net worth individuals and families on estate planning and tax-oriented strategies and solutions for over seventeen years. She also educates families about best practices for sustaining family wealth and family unity across multiple generations.

Jean joined Merrill Lynch in 2010 as a Director, Wealth Strategist in the Century City office. Jean's experience includes planning for estate and gift taxes, wealth preservation, philanthropy, retirement, concentrated stock diversification, stock options, and other tax minimization strategies.

Jean first joined Bank of America through U.S. Trust in 2005, where she was a Senior Vice President of Wealth Planning Solutions in Newport Beach. Jean was a founding member of the San Francisco site of the Wealth Planning Center of Wells Fargo Private Client Services. She also practiced law with a focus on estate planning. While at PricewaterhouseCoopers, Jean served as West Region leader for Personal Financial Services Software Solutions. As a Wealth Strategist, Jean does not provide tax or legal advice in her role at Merrill Lynch.

Jean is a frequent speaker on topics relating to estate planning. She lives in Los Angeles with her husband, son, daughter, and pug.

Education | Designations | Licenses | Memberships

- Bachelor of Arts in Psychology (Regents' Scholar) – University of California, San Diego
- Juris Doctor/Master of Business Taxation – University of Southern California
- CERTIFIED FINANCIAL PLANNER™
- Member of the Bar in California
- Past President, Los Angeles Estate Counselors Forum