J.P.Morgan

BIOGRAPHY

Christopher P. Siegle
Wealth Advisor

Chris Siegle, Executive Director, joined JPMorgan in 2010 after practicing trust and estates, employee benefits, and corporate transactions in Arizona for 13 years. He is a member in the State Bar of Arizona and the Maricopa County Bar Association. He is active in Valley Estate Planners, and on the Professional Advisory Boards of the Arizona Community Foundation and the Catholic Community Foundation in Phoenix, Arizona.

He is part of the Wealth Advisory team within JPMorgan Private Bank. Chris assists other advisors to integrate analysis around investment, tax/estate planning, and family succession advice to clients in all areas of wealth planning, including meeting retirement needs, planning for children and grandchildren's educational needs, estate planning, insurance, 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 including "The Clock is Ticking . . .Year-End Tax Considerations for Business Owners" for the State Bar of Arizona Tax Section on October 23, 2012; "Planning in a Cross Border World" for advisors in Las Vegas on October 25, 2012; "Securities Law for Estate Planners" in Las Vegas on November 14, 2016, and to five law firms in Scottsdale and Phoenix in June, July, and September, 2017; "The Who, What, Where, Why, When, How of Charitable Planning" in Las Vegas on November 4, 2016; "Generation Skipping Transfer Tax, Arizona Legacy Trusts, and the Rule against Perpetuities" for the Maricopa County Bar Estate Planning, Probate and Tax Section, February 18, 2014, and February 24, 2015 and many other seminars for clients and advisors. 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 graduated from the University of Illinois, and with honors from the University of Tulsa College of Law. Chris holds a Master of Strategic Studies degree from the U.S. Army War College. He is a Captain in the U.S. Navy Reserve and has served since 1990.

Chris is married with 2 children. He is very involved with community activities and the U.S. Navy.