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Marty is a Senior Vice President, Global Tax Advisory for BNY Mellon Wealth Management. He advises clients on all aspects of family wealth transfer, business succession, philanthropy, and income tax, estate tax, gift tax and generation skipping tax mitigation strategies.

Prior to joining BNY Mellon Wealth Management, Marty was a senior vice president and national director of estate planning for Hawthorn, PNC Family Wealth.

Marty previously was a senior wealth planner for Brown Brothers Harriman and PNC Wealth Management. Marty has over thirty-six years experience in wealth management and estate planning, previously as an attorney in private practice with New Jersey based firms McCarter & English and Archer & Greiner focusing on estate planning, tax planning, charitable planning and business succession planning.

Marty has been widely published in national and regional legal periodicals such as Estate Planning Magazine, Journal of Practical Estate Planning, and the New Jersey Law Journal. Marty is a regular speaker for groups of attorneys, other professional advisors, business owners and clients.

Education

J.D., University of Pennsylvania Law School
B.S., Economics, Wharton School, University of Pennsylvania

Memberships

Member, PA and NJ Bar
Member, Philadelphia Estate Planning Council
Board Member, Liberty USO
Member, Barnes Foundation Professional Advisors Council