Sharon L. Klein
Senior Vice President, Wilmington Trust, N.A.
sklein@wilmingtontrust.com

With more than 25 years of experience in the wealth advisory arena, Sharon is known for her ability to help guide her clients through life's transitions. Both clients and their advisors turn to Sharon for her considerable knowledge as well as her compassionate approach, particularly during challenging times.

As President of Family Wealth in the Eastern U.S. Region, Sharon leads teams of professionals who provide planning, trust, investment management, private banking, and family office expertise. She also heads Wilmington Trust's National Matrimonial/Divorce Advisory Practice, which provides guidance and resources for attorneys and other trusted advisors to help create fully coordinated service for those impacted by divorce. Prior to joining Wilmington Trust, Sharon was Managing Director at Lazard, the internationally renowned global investment banking and management company. In her role as Head of Wealth Advisory of Lazard Wealth Management, she led the delivery of all wealth advisory services. Before that, she headed the Estate department at Fiduciary Trust Company International. Sharon began her career as a trusts & estates attorney at Rosenman & Colin (now Katten Muchin Rosenman LLP).

Awards, recognition, and degrees

Global media company *Forbes* features Sharon as a top Advisor in 2021 in two separate categories: One of the Top 100 Women Wealth Advisors in America, and a Best-In-New York Wealth Advisor. Leading business publication *Crain's* named Sharon to its 2020 inaugural list of the Most Notable Women in Financial Advice, an honor that recognizes leading women executives in New York City for their dedication to excellence in the financial industry and significant professional, civic, and philanthropic contributions. In 2018, she was honored by the UJA-Federation of New York Lawyers Division for her contributions to the trusts & estates community and the community at large. Sharon is a Fellow of the American College of Trust and Estate Counsel, a highly selective professional organization of preeminent peer-elected estate planning attorneys in the U.S. and internationally who are chosen based on outstanding reputation and exceptional skill. She is a Certified Divorce Financial Analyst and holds a Master of Laws from the University of California Berkeley Law School and a Bachelor of Arts and a Bachelor of Laws from the University of New South Wales, Australia.

Speaking and authorship

A nationally recognized speaker and author in her field, Sharon has presented for the most widely-respected professional organizations in the country, including the Heckerling Institute on Estate Planning, New York University's Institute on Taxation, Duke University's Estate Planning Conference, Notre Dame's Tax & Estate Planning Institute, the American Academy of Matrimonial Lawyers, and Bloomberg BNA's Tax Management Board. She is frequently featured or quoted in publications such as the *Wall Street Journal, The New York Times, Estate Planning* magazine*, Trusts & Estates* magazine and *Family Lawyer Magazine*. Sharon is the author of myriad thought leadership publications and two eBooks on divorce planning considerations for advisors and their clients. Her work in the divorce arena can be found on Wilmington Trust's Matrimonial and Divorce Advisory Solutions page: www.wilmingtontrust.com/divorce.

Professional associations

Sharon is a member of The Rockefeller University Committee on Trust and Estate Gift Plans, the New York Bankers Association Trust & Investment Division Executive Committee, the Estates, Gifts and Trusts Advisory Board for The Bureau of National Affairs and the Thomson Reuters Trusts & Estates Advisory Board. She chairs the Domestic Relations Committee of *Trusts & Estates* magazine, where she sits on the Board, and is on the Advisory Board of *Family Lawyer Magazine*. Sharon is a past chair of the New York City Bar Association's Trusts, Estates and Surrogate's Court Committee, and a past chair of the New York State Bar Association's Trusts and Estates Law Section Taxation Committee. She served on the Board of the American Brain Foundation and was a member of its Finance Committee.

Personal life

Sharon holds U.S., British and Australian citizenships. Sharon, her husband and three children are passionate about world travel and share an intense curiosity for exploring and learning about new cultures, cuisines, history, and local politics. Thailand, Vietnam, Peru, and a South African safari top the list of some of their most interesting trips.