



HANNAH SHAW GROVE

Chief Marketing Officer, Foundation Source

Hannah Shaw Grove has spent three decades studying and working with successful families, family offices and their closest advisors on achieving their wealth management priorities. She is the Chief Marketing Officer of Foundation Source, the nation's largest provider of management solutions for private foundations, and the author of 11 data-based books – including *Maximizing Personal Wealth*, *The Family Office* and *Fame & Fortune* – and hundreds of reports and articles.

Her writing and research cover a wide range of topics – wealth creation, luxury lifestyles, alternative investments, legacy planning, considerations when selling a business and financial technology – but generally focus on how successful families and their key advisors can work together more effectively.

Her work on family offices has been translated into Chinese and Japanese and she has spoken on topics related to the high-net-worth markets at Columbia University's Center for the Study of Wealth and Inequality and as a repeat guest lecturer at The Wharton School of the University of Pennsylvania. She is the founder of *Private Wealth* magazine and has been a regular contributor to *Robb Report Lifestyle*, *Worth*, *Forbes.com*, *Financial Advisor*, *WealthManagement.com* and the *Journal of Financial Planning*.

Previously, Hannah has been the Chief Marketing Officer at Apex Clearing, iCapital Network and Merrill Lynch Investment Managers. She has also held strategic management roles at Prudential Financial and Fidelity Investments.

Hannah graduated cum laude from Harvard University with an ALB in humanities and holds the FINRA Series 6, 7, 24, 26 and 63 licenses.

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