

John Benevides

East Region Executive

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CREDENTIALS

Certified Private Wealth Advisor®
(CPWA)

MBA and M.S., finance,
Johns Hopkins University

B.S. in psychology and
economics, University of
Maryland

As East Region Executive for Private Wealth Management, John provides vision, strategic and operational leadership in service to clients across the Eastern U.S. His responsibilities include delivering personal wealth management services to private individuals with significant wealth.

John's background includes more than 25 years of private wealth management and financial services experience. He served as CEO of CTC myCFO, a family office subsidiary of the Bank of Montreal. He also directed the activities of BMO Delaware Trust Company and led the ultra-high-net-worth activities of BMO Harris Private Bank. Prior to that, he was co-owner and president of Family Office Exchange (FOX), a private network for ultra-high net worth families and family offices. John previously served as a partner and managing director of Financial Services for the publicly traded Corporate Executive Board (CEB), now Gartner.

John earned both his Master of Business Administration and Master of Science in finance degrees from Johns Hopkins University. He holds a Bachelor of Science degree in psychology and economics from the University of Maryland. John is a Certified Private Wealth Advisor®.

John serves as a board member and chair of the finance committee for the Cincinnati Contemporary Arts Center (CAC). In 2018 he joined the board and serves as a trustee for the Cincinnati Zoo. He is also a board member, chairing and participating on various committees for the Cincinnati Regional Business Committee (CRBC) and YPO Cincinnati. He is the former chairman and executive committee member for the YPO Global Family Business Network.

John makes his home in Cincinnati with his wife Kerry and two of his three children.

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