

BIOGRAPHY

Alvina H. Lo

Chief Wealth Strategist



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Expertise In

- Estate and trust planning
- Succession planning
- Life insurance planning
- Cross-border planning

As part of the Wilmington Trust and M&T Emerald Advisory Services™ team, Alvina is responsible for wealth planning, strategic advice, and thought leadership development for Wilmington Trust's Wealth Management division. She oversees a national team of wealth strategists, financial planners, and thought leadership experts, who together, serve as advisors to high-net-worth individuals and families, business owners, entrepreneurs, and foundations and endowments.

Prior to joining Wilmington Trust, Alvina was the director and senior wealth planner for Citi Private Bank where she served as an advisor to U.S. and international ultra-high-net-worth clients. Previous to that, she served as a wealth strategist with Credit Suisse Private Wealth. Earlier in her career, Alvina practiced law at Milbank Tweed Hadley & McCloy, LLP in the Trusts & Estates group and served as a consultant for Deloitte Consulting and Scient Corporation. Alvina holds a bachelor's degree in civil engineering from the University of Virginia where she was a Thomas Jefferson Scholar. She received her JD from the University of Pennsylvania, where she was a member of the Law Review and Order of the Coif. She also holds a Professional Tax Certificate in Estate Planning from New York University School of Law.

Alvina was most recently recognized as one of Worth's Groundbreakers 2020: 50 Women Changing the World. She is a published author and has lectured at the American Bankers Association, American Bar Association, Delaware Trust Conference, Hawaii Tax Institute, and Barron's Advisors Summit. She has been quoted in the New York Times, Barron's, Bloomberg and Business Insider. She is admitted to practice in the state of New York and New Jersey. She is also a member of the Society of Trust and Estate Practitioners (STEP) and is a member of Women In America, a professional development group. She is a regional committee co-chair of the Thomas Jefferson Scholarship Foundation for the University of Virginia. Alvina is bilingual and speaks fluent Chinese-Cantonese and basic Chinese-Mandarin.

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