



Kathleen A. Stewart, JD, AIF®

Senior Wealth Strategist
BNY Mellon Wealth Management

Kathleen Stewart is a senior wealth strategist with BNY Mellon Wealth Management. In this role, she works closely with wealthy families and their advisors to provide comprehensive wealth planning services. She supports the thought leadership and initiatives of the organization with respect to the delivery of wealth planning services.

Kathleen has more than 20 years of experience in the financial services industry. Prior to joining the BNY Mellon in 2013, Kathleen held positions at Wells Fargo's Private Bank, PNC Wealth Management and the Ayco Company, LP, which is now part of Goldman Sachs. Kathleen focuses on complex issues surrounding areas of financial and estate planning impacting wealthy families, key corporate executives, and business owners.

Education

Bachelor's Degree, Duquesne University
Juris Doctor, Duquesne University School of Law

Certifications

Accredited Investment Fiduciary®
Bar and Court Admissions, Commonwealth of Pennsylvania

Memberships

Financial Planning Association of Pittsburgh
(President in 2014)
Estate Planning Council of Pittsburgh
Allegheny County Bar Association
Board Member, Baptist Homes Foundation

Recent Notices, Publications & Awards

Featured speaker at conferences and seminars
Including FPA National Conference and PA
Governor's Conference for Women
Quoted in publications including Think Advisor and
Pittsburgh Business Times