

Private Bank

Jane Bachmann CFP[®], CIMA[®]



Managing Director
Private Banker
Citi Private Bank
North America

Jane Bachmann joined Citi Private Bank as Director and Ultra High Net Worth Private Banker in February 2012. Jane and her team are responsible for managing complex client relationships and providing a variety of sophisticated strategies including asset management, credit/lending, customized banking, tax-efficient generational wealth transfer, estate planning and philanthropy. She holds Series 7, 63 and 66 licenses.

Jane joined from The Presidio Group LLC in San Francisco, one of the largest privately owned independent wealth management firms in the country with \$4 Billion under advisement and 150 client relationships with a minimum net worth of \$50 million, at which she was a partner.

Prior to Presidio, Jane spent 17 years with Fidelity Investments in a myriad of Wealth Management roles, including 10 years as Vice President/Senior Account Executive in the Private Client Group, advising on investment and wealth management strategies, managing a book of 500 clients with total assets exceeding \$2 Billion.

Jane earned her MBA from the University of North Texas and her BA from the Beijing Foreign Studies University. She is both a Certified Financial Planner[®] (CFP[®]) and a Certified Investment Management Analyst[®] (CIMA[®]) and is bilingual in both English and Mandarin Chinese.

Jane and her husband have 2 children and reside in Oakland.

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