

JAMES M. MARION

National Fiduciary Executive

U.S. Trust, Bank of America Global Wealth Investment Management



Jim Marion is U.S. Trust's National Fiduciary Executive and a Managing Director of Bank of America, N.A., where he heads the trust and estate administration organization across the U.S. Trust national footprint. He most recently served as U.S. Trust's National Fiduciary Advisor Executive, responsible for all new trust business acceptance in U.S. Trust and National Fiduciary Investment Advisor, acting as the liaison between the fiduciary administration and investment organization within U.S. Trust and Bank of America, N.A.

As National Fiduciary Executive, Jim is accountable for managing the group of professionals delivering fiduciary services to the U.S. Trust private client trust business across all channels. He is primarily responsible for developing and driving trust strategy across all private client trust and estate administration groups to drive the delivery of unmatched fiduciary service to the Bank's clients. Jim is also responsible for the platform and channel management activities that support the private client fiduciary activities of U.S. Trust.

In partnership with U.S. Trust's Chief Investment Officer, Jim works to ensure that trust, estate and other fiduciary accounts are managed in adherence to the highest of fiduciary standards applicable to those accounts. He assesses business needs and works with Divisional and National Executives and UST partners to execute the trust strategy.

Prior to joining U.S. Trust, Jim served as Trust Counsel for LaSalle National Bank and ABM AMRO North America in Chicago, from 1994-2007. Prior to that, he was a practicing attorney in Chicago, specializing in estate planning, estate administration and fiduciary litigation. Jim received a bachelor's degree in Economics and Spanish and a master's degree in Geography from Kansas State University, a J.D. from the University of Kansas School of Law and a Masters of Business Administration from the University of Chicago Booth School of Business.

Jim is a member of the Illinois State Bar Association, where he is a past Chair of the Trusts and Estates Section Council; the Chicago Bar Association, where he serves on the Trust Law Committee; and the American Bar Association - Real Property, Trust and Estate Law Committee. He is a member of and past chair of the American Bankers Association Trust Counsel Committee and the National Conference of Lawyers and Corporate Fiduciaries. He is a member of the Executive Committees and past president of the Trust Management Association and the Corporate Fiduciaries Association of Illinois.