

Lisa M. Garcia

Chief Risk Officer, Atlantic Trust Private Wealth Management, a CIBC Company

Lisa Garcia is Atlantic Trust's Chief Risk Officer and a member of Atlantic Trust's Operating Committee and CIBC's US Operating Committee. With more than 30 years of industry experience, Lisa is responsible for the management of the firm's risk management platform. Since joining the firm in 2003, Lisa has served in several positions related to risk management, fiduciary services, centralized oversight, tax reporting, fund administration and charitable gift planning. Prior to joining Atlantic Trust, Lisa was the manager of client services at Loring, Wolcott, & Coolidge, a principal in the Charitable Gifts Office of State Street Global Advisors and held positions in various capacities at Mellon Private Wealth Management, including vice president and manager of the fiduciary tax department and team leader for the Planned Giving and Wholesale Trust departments. Lisa began her career at Coopers & Lybrand in New York. She earned a Bachelor of Science in business administration from Manhattan College, a Master of Science in taxation, a Certificate of Tax Specialization and a Master of Business Administration in business ethics, with distinction, from Bentley College. Lisa is a Certified Public Accountant, a Chartered Global Management Accountant and a member of the American Institute of Certified Public Accountants. She is also an adjunct faculty member at Bunker Hill Community College and previously served as the Treasurer for the Episcopal Diocese of Massachusetts and Chair of its Budget Committee, on the Audit and Finance Committee of the New England Organ Bank and as a Big Sister. Lisa helps to identify and plan many of the Boston office's charitable initiatives.