

# CHADWICK PROCTOR, JD, LL.M., CTFA

## EXECUTIVE SUMMARY

Senior fiduciary, tax, trust, and estate professional with nearly 20 years of experience serving high-net-worth individuals, business owners, multigenerational families, and nonprofit organizations. Recognized as a subject-matter authority on sophisticated trust, estate, and income tax issues. Skilled in diagnostic information gathering to identify and uncover unstated client needs, enabling expanded planning opportunities and integrated solutions. Proven collaborator with financial consultants, portfolio consultants, and internal partners. Experienced in delivering group presentations and advisor education. Licensed Washington attorney with an LL.M. in Taxation and CTFA designation, bringing strong fiduciary governance, risk identification, liquidity planning, and comprehensive wealth-transfer expertise.

## CORE COMPETENCIES

Subject-Matter Expertise in Trust, Estate, and Income Tax • Advanced Estate & Tax Planning • High-Net-Worth Client Advisory • Diagnostic Interviewing & Needs Identification • Uncovering Unstated Client Needs • Intergenerational Wealth Transfer • Business-Owner & Liquidity Event Planning • Estate & Trust Document Review • Fiduciary Governance & Risk Identification • Complex Estate Structures • Collaboration with Financial Consultants • Internal Partner Education & Presentations • Regulatory Knowledge • Wealth Management Integration • Complex Asset Trust Administration • Succession & Legacy Planning • Referral & Strategic Growth Development

## PROFESSIONAL EXPERIENCE

### ***Charles Schwab – Director, Tax, Trust and Estate***

April 2026 - Present | Pacific Northwest Region

- Advise clients on estate planning, trust structures, tax considerations, and wealth-transfer strategies.
- Provide guidance to advisors and clients on a range of topics including estate planning, retirement planning, business succession planning and charitable giving.

### ***BNY Wealth – Regional Fiduciary Manager***

Dec 2019 – April 2026 | Greater Seattle Area

- Coordinated fiduciary oversight for complex trust and estate relationships for high-net-worth and ultra-high-net-worth clients.
- Reviewed trust documents, estate plans, and tax implications to identify risks and planning opportunities.
- Served as regional subject-matter expert on trust, estate, and income tax issues.
- Collaborated with advisors, investment teams, attorneys, and specialty asset groups.
- Conducted internal education for financial consultants on estate planning and tax strategy.

***Northern Trust Wealth Management – Senior Fiduciary Officer, VP***

Jul 2015 – Mar 2019 | Greater Seattle Area

- Delivered trust, estate, and financial planning guidance to high-net-worth clients.
- Conducted needs analysis to identify planning and tax opportunities.
- Recommended trust, credit, and investment solutions aligned with client goals.

***Comerica Bank – Trust and Estate Specialist, VP***

Oct 2011 – Jul 2015 | Manhattan Beach, CA

- Managed a large book of trust and estate relationships.
- Coordinated with tax managers, specialty asset teams, and attorneys.
- Supervised estate analysts and expanded regional trust services.

***Wells Fargo Wealth Management – Senior Trust Officer, AVP***

Aug 2006 – Oct 2011

- Administered complex trust and estate accounts including foreign probate, real estate, mineral rights, and closely held businesses.
- Evaluated estate planning documents to identify risks.
- Collaborated with attorneys, accountants, and internal partners.

**EDUCATION**

University of Washington School of Law — LLM, Taxation (2005–2006)

Saint Thomas University School of Law — Juris Doctor (2002–2004)

University of North Carolina at Chapel Hill — B.A., Economics and Political Science (1998–2002)

**CREDENTIALS**

Licensed Attorney, State of Washington

Certified Trust and Financial Advisor (CTFA), 2009

**ADDITIONAL INFORMATION**

Experienced presenter on trust, estate, tax, and fiduciary topics.

Extensive international travel: nearly 100 countries.