

Lighting the Way

Members of the Private Bank Greenwich team attended the 12th annual [Light a Fire](#) awards ceremony on Dec. 5th 2019 with a great deal of pride. Beyond being a Platinum sponsor, the team works closely with philanthropists and nonprofits from around the state, some of whom were honored that night.

“It’s rewarding for myself and my 40+ colleagues at the Greenwich Private Bank to see the work we do with our clients every day manifest itself tonight,” said Ian Dilts, Head of Investments and Advice for J.P. Morgan Private Bank in Greenwich, at the Light a Fire ceremony. “Our advice can facilitate philanthropic giving, and that giving facilitates impactful work in our community.”

With \$40 billion in client assets, Dilts and his team work with many of Connecticut’s most prominent families and individuals to provide advice across investments, banking, financial planning and philanthropic giving. For many of those clients, philanthropy is at the forefront of their goals.

“Families need to consider how their wealth supports a certain lifestyle; they want to understand what is the right amount to leave their children,” Dilts said. “When those priorities are solved, families can create the freedom to achieve their philanthropic intent.”



Ian Dilts
Managing Director,
Head of Investments

The team doesn’t rest on the good deeds of its clients though. Private Bank employees in Fairfield County have completed more than 900 hours of community service in the past year, while the firm has given over \$450,000 in nonprofit contributions and \$300,000 in community development support. Across Connecticut the total is more than \$860,000 in nonprofit contributions in 2019, and more than \$500,000 in community development support.

At the Light a Fire ceremony, Dilts described the dynamic between J.P. Morgan and its clients.

“It’s incredibly important to us in the Private Bank to be involved in our communities and give back; it is in our DNA as a firm to support local nonprofits and invest in our communities” Dilts said. “This helps us understand how to advise our clients as they try to give back as well—so tonight is closely tied to the work we do for our clients at the J.P. Morgan Private Bank.”

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