

B I O G R A P H Y

Colleen W. Dean, CFP®

Managing Director & Banker

As a J.P. Morgan Banker, Colleen evaluates the resources available throughout the firm to determine which are best suited for each client's current and future needs. These include capabilities in financial planning, trusts and wealth transfer strategies, private banking and investments.

She began her financial services career in Credit Analysis and Underwriting, Commercial Lending, Human Resources and Loan Review in 1986 with JPMorgan. She has worked in the Houston, Fort Worth and San Antonio J.P. Morgan offices and joined J.P. Morgan's Private Bank in 1992. Colleen is also a Certified Financial Planner and holds the series 7, 9, 10, 63, and 24 licenses.



Education

- University of Texas, MBA Finance & Accounting
- Southwest Texas State University, B.S. Home Economics

Personal and Other Affiliations

- Advisory Director, Texas State University, McCoy College of Business
- Board of Directors, YMCA of Greater San Antonio
- Prior Trustee, Southwest School of Art and Craft
- Prior Treasurer, Cancer Center Council

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