

Wealth Strategist Profile



Jeremiah W. Doyle, IV
Senior Vice President

Jere Doyle is an estate planning strategist for BNY Mellon Wealth Management and a senior vice president of BNY Mellon. He has been with the firm since 1981. Jere provides wealthy individuals and families throughout the country with integrated wealth management advice on how to hold, manage, and transfer their wealth in a tax efficient manner.

Practices

- Estate planning and wealth management strategies

Education

- LL.M., banking law, Boston University Law School
 - LL.M., taxation, Boston University Law School
 - Juris Doctor, Hamline University Law School
 - Bachelor's degree, Providence College

Bar and Court Admissions

- Commonwealth of Massachusetts
 - United States District Court
- United States Court of Appeals (First Circuit)
 - United States Tax Court

Memberships

- Former member, Massachusetts Joint Bar Committee on Judicial Appointments
 - Member, American Bar Association
 - Member, Massachusetts Bar Association
 - Member, Essex County Bar Association
 - Member, Boston Estate Planning Council
- Former president, Boston Estate Planning Council
- Executive committee member, Boston Estate Planning Council
 - 20-year member, Essex County Bar Association Executive Committee

Notices, Publications and Awards

- 2009 Estate Planner of the Year, Boston Estate Planning Council
 - Editor and co-author, Preparing Fiduciary Income Tax Returns
 - Contributing Author, Preparing Estate Tax Returns
 - Contributing Author, Understanding and Using Trusts and contributing author of Drafting Irrevocable Trusts in Massachusetts, both published by Massachusetts Continuing Legal Education
- Quoted in numerous business publications and has appeared as an expert on wealth management issues on CNBC, MSNBC, and CNN
 - Estate Planning Hall of Fame®, National Association of Estate Planners and Councils
- Distinguished Accredited Estate Planner®, National Association of Estate Planners and Councils
- Teacher, Graduate Tax Program at Boston University Law School



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