



Ann Limberg
Head of Philanthropic Solutions and the Family Office
U.S. Trust, Bank of America Private Wealth Management

Ann Limberg is head of Philanthropic Solutions and the Family Office. She directs the provision of strategy, services and outreach within these dual areas, advancing their synergy and aligned objectives across the wider organization.

As head of Philanthropic Solutions for Merrill Lynch and U.S. Trust, Limberg oversees strategic, fiduciary, and administrative services to help individuals and families grow, manage and preserve philanthropic capital. She also leads U.S. Trust's direct engagement with nonprofit organizations, facilitating mission fulfillment and organizational stability through investment policy, governance, board and staff education, and development.

As head of the Family Office, a specialty practice within U.S. Trust, Limberg oversees a suite of integrated offerings for multi-generational families with complex needs. Working in concert with a family's advisors, the practice offers integrated financial strategy, investment consulting, fiduciary and administrative services, and cross-generational educational initiatives designed to foster sound stewardship and effective wealth preservation and transfer.

Limberg has worked at Bank of America since 2004, taking on increasing responsibilities within the firm. Her previous roles include Northeast Division executive for U.S. Trust, where she oversaw client outreach and wealth management strategy across 20 offices in nine states, and regional executive, where she led the New Jersey, Pennsylvania, and Delaware offices of U.S. Trust. Concurrent with her regional executive role, Limberg served as New Jersey state president for Bank of America. Limberg's career also includes senior leadership positions with Fleet Boston Financial, NatWest and Citibank.

Limberg has garnered a number of professional and civic honors. Irish America magazine recognized her as a "Wall Street 50" honoree. Other honors include NJBIZ's "50 Most Powerful Nonprofit Board Members in New Jersey," the United Way's Women United in Philanthropy Award, the American Conference on Diversity's Humanitarian Award, the Executive Women of New Jersey's "Salute to the Policy Makers," and NJBIZ's "New Jersey's Best 50 Women in Business" and "Top 25 Women of Influence."

Passionate about philanthropy, Limberg holds a number of leadership roles within the community. She serves as on the board of trustees of Valley Hospital, where she is board secretary; Macaulay Honors College Foundation, where she is chair of the Development Committee; NJTV; and Bergen County's United Way. In addition, Limberg is a member of the City University of New York's Business Leadership Council and the Committee of 200, an organization of leading women executives dedicated to fostering growth and increasing opportunities for women entrepreneurs and corporate leaders worldwide.

Limberg received her B.A. in humanities with a minor in business administration from the State University of New York at Stony Brook. She has also completed executive education through the Cannon Trust School.