



Russell Goldstein CFP®, CAP®:

Russell Goldstein CFP®, CAP® is an Institutional Client Advisor at U.S. Trust, Bank of America with over 18 years of experience in financial services. In his role, he is responsible for identifying the needs and advising philanthropists, foundations and nonprofits. He provides guidance and sets the strategic direction for individuals and organizations focused on the community. This experience consists of education, advice, implementation, execution and monitoring focused on their needs and mission.

Russell is certified as a BoardSource Certified Governance Trainer. He is also part the Community Foundation's Professional Advisory Board. He is also a Chartered Advisor in Philanthropy (CAP®). He is a graduate of the Social Impact Strategy program at UPenn through the School for Social Policy and Practice. Recently, Russell was recognized as a "Nonprofit Visionary Leader" by the Sanford Institute of Philanthropy. He is also currently enrolled at Arizona State University for a Masters in Sustainability Leadership. He serves on the US Trust National Council for Impact Investing.

Russell is Past President Board of the Planned Giving Roundtable of Arizona. He is a National Board member of SeedSpot, a social entrepreneur incubator. He currently serves as Advisory Board and the Chair of the Planned Giving Committee for The Musical Instrument Museum. Russell in addition, is the Chair of the Planned Giving Committee and Advisory Board Member of Scottsdale Museum of Contemporary Art as well as Humanity Chair and Advisory Board Member for Phoenix Fashion Week. He also serves as on the Planned Giving Committee for the Phoenix Art Museum, Committee Member of the Bank of America Charitable Foundation in Arizona.

He is a frequent presenter at national conferences focused on planned giving, philanthropy and building exceptional boards. Most recently Russ presented at The Harold Grinspoon Life and Legacy Conference in Springfield, MA as well as for the Giving Institutes Board of Advisors.