Rockefeller Capital Management Announces Specialized Philanthropic Advisor Addition to Global Family Office

New York (March 8, 2021) -- Rockefeller Capital Management ("Rockefeller" or the "Firm") has today announced the appointment of Andrea Lawrence as the Head of Philanthropy within Rockefeller's Global Family Office, where she will strategically advise the Firm's clients through their charitable giving to create impact and help build momentous legacies. She will report to Heather Flanagan, Head of Trust Fiduciary and Family Office Services, and is based in Philadelphia, Pennsylvania.

"Providing individuals and families with tailored strategies that create meaningful contributions is a core part of our offering across the Global Family Office," said Flanagan. "Andrea is a significant addition to our team, and we're thrilled to welcome her entrepreneurial spirit, deep knowledge of fiduciary management and creative solutions to counsel individuals and families around their giving strategies."

This appointment continues Rockefeller's deliberate and strategic growth across the Global Family Office, which holistically serves the Firm's high net worth and ultra-high net worth clients and is merged with their leading private wealth practice, which includes trust companies, client accounting, client advisory and wealth strategy services. Earlier in 2021, the business announced its acquisition of Whitnell & Co. ("Whitnell") to provide affluent families across the Midwest with a complete set of multi-family office services centered around financial planning, wealth management and generational wealth transfer.

"The Rockefeller name is synonymous with philanthropy, charitable endeavors and improving the world for the next generation," added Lawrence. "In a year where philanthropy is top-of-mind given the concurrent pressures from COVID-19 and the rise in conversations and action around equity, I am excited to help Rockefeller's clients use their means to create a legacy that lasts."

Lawrence joins Rockefeller from Tapestry Advisors, LLC, an independent family office and philanthropy consulting firm, which she founded in 2007. Prior to that, she held various leadership roles managing estate planning at Ballamor Capital Management and Calibre, Wachovia's family office. She began her career in tax consulting at Price Waterhouse and has held estate planning and legal roles at the Office of Chief Counsel of the Internal Revenue Service and several regional law firms. Lawrence graduated from the University of Virginia's McIntire School of Commerce, and from Villanova University's Charles Widger School of Law with both a J.D. and Master of Laws in Taxation.

More about Rockefeller's Global Family Office capabilities can be found at https://rcm.rockco.com/global-family-office/

About Rockefeller Capital Management
Rockefeller Capital Management is a leading independent, privately-owned financial services firm offering global family office, asset management and strategic advisory services to ultra-high-net-worth individuals and families, institutions, and corporations.

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