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Maxwell Hine, CFA®, CFP®

VICE PRESIDENT

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Maxwell Hine is a Vice President and Banker in the Pittsburgh office of J.P. Morgan Private Bank. Max works closely with some of the most successful entrepreneurs, business owners, corporate executives and centers of influence in the area who seek experienced guidance for complex financial decisions to make the most of their wealth. He serves as a powerful advocate so they can focus on their demanding careers.

Max believes the successful integration of an individual's financial life ultimately depends on partnering with them and getting to know their family members and other key advisors. He takes a holistic look at the entire balance sheet—investment portfolios, trusts, tax strategies, business ownership—serving in a virtual family-office role and designing comprehensive plans that consider all elements of their financial picture. Max simplifies the complexities of substantial assets and lays the groundwork for a generational legacy. Energetic and driven, he thrives in collaborative team environments and brings passion to everything he does.

Over a nearly decade-long career, Max has gained significant insight into the sophisticated needs of ultra-high-net-worth clients. His strength can be found in the tax-efficient investment portfolios he builds for complicated trust and estate plans. Most recently, Max was a Relationship Manager at UBS, where he presented the firm's market views and research in conversations with clients and team members. Previously he was at Goldman Sachs and Waldron Private Wealth.

Max holds a B.S.B.A. in Finance with a minor in Economics from the University of Pittsburgh. His lifelong interest in investments led him to complete a series of competitive internships while in school. He is a CERTIFIED FINANCIAL PLANNER™ professional, holds the Chartered Financial Analyst® designation and is a member of the CFA Society.

Having grown up in Dubois, Pennsylvania—population 7,500—Max espouses the small-town value of building community through strong relationships. When out of the office, he golfs, skis, cooks, trains and travels abroad.