
V. David Russell

Banker



J.P. Morgan Private Bank

2200 Ross Avenue, Floor 7
Dallas, TX 75201

jpmorgan.com/privatebank

PHONE

214.965.2218

EMAIL

david.russell@jpmorgan.com

David Russell is a Banker in the Dallas office of J.P. Morgan Private Bank. He advises families, entrepreneurs, Fortune 500 executives, endowments, foundations, and professionals in sports and entertainment. David's true value lies in his ability to manage excess liquidity and provide advice on both sides of the balance sheet to help clients establish their legacy and enhance their desired impact.

Introduced to a career in Finance while in school, David began his career at TPG Capital and Ernst & Young to focus on the private equity industry. More interested in the personal aspect and influence of Private Wealth Management, he joined UBS and Portrait Financial to deliver innovative solutions around investment allocation and transfer of wealth.

Originally from Detroit, David has a unique understanding of the emotional and mental aspects that accompany first-generation wealth creation, particularly for affluent people of color. His perspective drove a passion to work primarily with clients that are the first to build wealth and for which a financial information gap exists. This inequity, which often disrupts the ability to further generational inheritance, spurred him to create the first and only business initiative at the Private Bank for affluent people of color. Aptly named Shades of Wealth, this multi-faceted program is currently being launched across the nation as a priority for the firm.

David attended Texas Christian University, where he earned a B.B.A. in Accounting and Finance. He is currently an Adjunct Professor at TCU's M.J. Neeley School of Business and sits on the Chancellor's Young Advisory Council. He also holds an M.S. in Accounting from Oklahoma State University, which he attended on the prestigious Ronald E. McNair Fellowship.

David's interest outside of work extends to art, travel, sports, civic engagement, and nonprofit board leadership. He serves with local and national organizations working on education advocacy and reform, criminal justice reform, and impact investing.

INVESTMENT PRODUCTS: • NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

"J.P. Morgan Private Bank" is a brand name for private banking business conducted by JPMorgan Chase & Co. and its subsidiaries worldwide. Bank deposit accounts, such as checking, savings and bank lending, may be subject to approval. Deposit products and related services are offered by JPMorgan Chase Bank, N.A. Member FDIC. JPMorgan Chase Bank, N.A. and its affiliates (collectively "JPMCB") offer investment products, which may include bank-managed accounts and custody, as part of its trust and fiduciary services. JPMorgan Chase & Co. does not practice law, and does not give tax, accounting or legal advice. We are available to consult with you and your legal and tax advisors as you move forward with your planning. Other investment products and services, such as brokerage and advisory accounts, are offered through J.P. Morgan Securities LLC ("JPMS"), a member of FINRA and SIPC. JPMCB and JPMS are affiliated companies under the common control of JPMorgan Chase & Co. Products not available in all states.