HARRIS myCFO®

Jim Cody is responsible for delivering comprehensive family office solutions to individuals and families of substantial wealth. He specializes in philanthropy, estate and trust planning and counsels clients on sophisticated tax saving, wealth preservation and wealth transfer strategies. He has more than 25 years of professional experience. Prior to joining Harris myCFO, Jim led the Estate and Trust practice group for a San Francisco area law firm, where he practiced law for over 17 years.

Jim earned a bachelor's degree in economics from Yale University, received his MBA from the Graduate School of Business at the University of California, Berkeley and holds a juris doctor degree (JD) from the University of California Hastings College of the Law. He is a member of the State Bar of California and is certified as a specialist in Estate Planning, Trust and Probate Law by the California Board of Legal Specialization of the State Bar of California. Jim is also a Fellow of the American College of Trust and Estate Counsel (ACTEC).

Jim makes his home in Burlingame, California. He serves on the Board of Trustees of Mills-Peninsula Hospital Foundation (currently serving as Treasurer) and is the chairman of its Planned Giving Committee and chairman of its Finance Committee.

JAMES R. CODY

Director,
Estate and Trust Services
Harris myCFO, Inc.

Tel: 650.210.5104
jim.cody@harrismycfo.com

Harris myCFO
2200 Geng Road, Suite 100
Palo Alto, CA 94303

Harris myCFO® | A Knowledge of Wealth™

Integrated wealth management with independent investment advisory services and the comprehensive capabilities of a multi-family office.

- INVESTMENT ADVISORY
- ESTATE AND TRUST ADVISORY
- TAX PLANNING
- PHILANTHROPIC PLANNING
- FAMILY EDUCATION
- CAPITAL ADVISORY SERVICES AND CUSTOM BANKING
- RISK MANAGEMENT AND INSURANCE ADVISORY
- FINANCIAL REPORTING AND EXPENSE MANAGEMENT

HARRIS myCFO®

BMO | A part of BMO Financial Group