

Francine Lee is a Director responsible for building strong relationships with individuals and families in need of integrated wealth management solutions to preserve, grow and protect their personal wealth. By delivering a full range of investment advisory, tax, estate planning and family office services, Francine is able to help clients simplify the complexities of managing significant wealth. She often works collaboratively with BMO Capital Markets and their clients, helping them with their unique wealth management needs.

Francine brings more than 25 years of experience in wealth management advisory services at industry leading organizations including HSBC Private Bank, Goldman Sachs Family Office, Prudential Securities and Lehman Brothers. She has extensive experience in capital markets transactions, income tax and wealth transfer strategies, executive compensation, alternative investments, consolidated reporting, family wealth and family office services. Francine began her career as a tax attorney in private practice focusing on closely-held businesses and international taxation.

Francine holds a Master of Laws in Taxation from New York University School of Law and Juris Doctor from Western New England School of Law. She is a published author and a significant contributor to Harris myCFO's *Women in Wealth* initiative.



**FRANCINE R. S. LEE**  
**Director**  
**BMO Harris Bank, N.A.**

Tel: 212.702.1988  
francine.lee@harrismycfo.com

Harris myCFO  
3 Times Square  
New York, NY 10036

## 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

