



Steven L. Faulkner

MANAGING DIRECTOR

HEAD OF PRIVATE BUSINESS ADVISORY

Steven L. Faulkner is a Managing Director and head of Private Business Advisory in J.P. Morgan Private Bank's Advice Lab. Mr. Faulkner is responsible for developing content and solutions for business owners, on issues such as mergers and acquisitions, corporate governance, pre-transaction planning, and maintaining a legacy business over multiple generations.

Mr. Faulkner was formerly responsible for managing a national team of more than 80 investment management, real estate, and business valuation professionals. Mr. Faulkner has extensive experience analyzing, reviewing, advising and transacting closely held businesses, limited partnerships and private equity investments. Mr. Faulkner presently serves on the Board of Directors of several closely held companies.

Prior to joining J.P. Morgan in 1998, Mr. Faulkner was a practicing attorney and advised a range of businesses from multi-national corporations to small family owned businesses in mergers and acquisitions, succession planning and litigation of closely held company issues. Mr. Faulkner is a graduate of Michigan State University (B.A.) and The Ohio State University (M.P.A., J.D.).

Mr. Faulkner has been a featured presenter at the O.C.C. Large Bank Field Examiners Seminar, multiple Delaware Bankers Association Trust Conferences and several National Trust Closely Held Business Association annual meetings as well as other conferences and associations. Mr. Faulkner regularly presents at legal and accounting firm continuing education events and private equity symposiums. Mr. Faulkner has been quoted in the Wall Street Journal, Financial Times, Dow Jones, Barrons, Bankrate.com, Kiplinger and Crain's Business. In addition, Mr. Faulkner was previously an adjunct professor for the Butler University Honors Program.

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