

J.P.Morgan

BIOGRAPHY

Megan Worrell

Managing Director, Senior Wealth Advisor

Global Families Group

New York

Megan Worrell is a Senior Wealth Advisor for the Global Families Group, Megan works with clients and their advisors to develop solutions specific to multi-jurisdictional tax planning, liquidity events, succession planning, trust and investment structuring, and family office matters. She has over twenty years of experience with tax compliance and estate planning.

Prior to joining JPMorgan, Megan was a partner at Duane Morris LLP where she served as Vice-Chair of the law firm's Private Client team, and Head of the team's International Practice Division. In that role, she provided international families with US federal income tax and wealth transfer planning advice. Megan's work involved foreign trusts, pre-immigration and expatriation planning, planning for the purchase of U.S. property by non-U.S. persons, asset transfers, beneficiary conflicts, and information disclosure and compliance issues.

Megan previously worked as an associate for both Lowenstein Sandler PC and McCarter & English, LLP, focusing on domestic estate planning. Prior to law school, she worked with private clients as a Certified Public Accountant at two "Big 4" accounting firms.

Megan is the former Chair (2017-2019) of the Society of Trust & Estate Practitioners (STEP), New York Branch. She was also the Vice Chair and Program Committee Chair from 2014 – 2016. Megan serves on the Private Client Committee of the International Bar Association, is an ACTEC (American College of Trust & Estate Counsel) Fellow and Academician of the International Academy of Estate and Trust Law.