Vanguard

Ryan Reed

Wealth Planning Consultant, Senior Specialist
Personal Investor

As your wealth planning consultant, I'll work with you and your financial advisor to educate you and your family, answer critical questions about the successful transfer of wealth, and create your personalized wealth planning strategy.

I'll provide insights on a variety of wealth planning topics, including how to manage estates and trusts, select fiduciaries, use estate/gift/income tax minimization strategies, plan charitable giving, and prepare your heirs to receive their inheritance.

As a member of your wealth planning team, I appreciate the opportunity to get to know you and your family and to understand your unique financial goals and objectives. I enjoy working alongside our financial advisors to help clients make important estate planning and wealth transfer decisions. My goal is to help clients build strategies for transferring wealth and values to future generations in a way that's most meaningful to them.

Prior to joining Vanguard in 2022, I was a wealth strategist with PNC Private Bank in Philadelphia. I earned a bachelor's degree in finance from The Pennsylvania State University and a master's degree in taxation from Villanova University. I'm a Certified Financial Planner™ (CFP®) professional as well as a Certified Exit Planning Advisor.

I'm a member of the Philadelphia Estate Planning Council and a fellow with LEADERSHIP Philadelphia. I live in the greater Philadelphia area with my wife and 3 children. I enjoy playing golf, spending time with family, and relaxing at the Jersey Shore.