

Phyllis Silverstein, CFP®, CAP®

Senior Vice President, Senior Regional Fiduciary Manager
Philanthropic Services -Southern Region
Wells Fargo Private Wealth Management



Phyllis Silverstein serves as Senior Vice President and Senior Regional Fiduciary Manager of Philanthropic Services within The Private Bank. Wells Fargo Philanthropic Services helps charitable individuals, families, and nonprofit organizations work toward their unique goals by providing specialized advisory services. Phyllis leads a team of experienced specialists that provides philanthropic advice to Wells Fargo clients and is responsible for enhancing our philanthropic offering to clients, helping her team deliver exceptional client service, and managing risk within her region.

Phyllis has over 35 years of professional fundraising and development experience. Prior to joining Wells Fargo, Phyllis spent 8 years as the Vice President of Planned Giving & Endowment for the Jewish Federation of Greater Atlanta where she developed a comprehensive endowment program involving donors, professional advisors and community organizations. She previously held senior resource development positions at the Greater Miami Jewish Federation and the Jewish Federation of Broward County.

Phyllis graduated cum laude, with a Bachelor of Arts in Sociology from Florida Atlantic University. Phyllis obtained a Certificate in Financial Planning from the University of Georgia, and has been awarded the CERTIFIED FINANCIAL PLANNER™ designation. Phyllis has been awarded the Chartered Advisor in Philanthropy® designation by the American College of Financial Services.

Phyllis is a member of the Board of Directors of the National Association of Gift Planners. She served as a subject matter expert for the CFP Board Exam Review and is a member of the Estate Planning Council of North Georgia. She has served as President and Board member of the Georgia Planned Giving Council. Phyllis currently serves on the Board of EduHousing as well as a Board Member for the National Hadassah Foundation.

Phyllis lives in Marietta, GA and has 5 children and is the Committee Chair for Cub Scout Pack 1818.

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