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He was National Director of Charitable Giving Services for Bernstein Investment Research and Management, a unit of Alliance Capital Management, L.P. His work at Bernstein involved investment planning for private clients with special emphasis on the investment management, asset allocation and administration of charitable planned giving vehicles and endowment funds.

He was also a founder and the first president of FJC, a New York not-for-profit organization that holds and administers donor advised, designated and endowed funds, and is a member of its board of directors.

He received his law degree from the University of Baltimore School of Law and a master's degree in nonprofit management from the New York University Wagner School of Public Administration.