



“Private business owners have complex lives and face unique challenges in their business and personal lives. The Center for Private Business Owners, leverages the firm’s 100+ years of experience serving private business owners and can assist clients at any stage of their business or personal lifecycles.”

Stephen E. Prostano

Partner, PKF O’Connor Davies LLP

Partner, PKF O’Connor Davies Advisory LLC

In a career spanning over three decades, Steve Prostano has distinguished himself as an innovator and thought leader in the wealth management, multi-family office and global financial services industries. He has designed and built leading global and national multi-family offices, asset management firms and has advised industry leaders, ultra-high-net-worth families, private business owners and family offices throughout his career.

Currently Steve is the Partner-in-Charge of PKF O’Connor Davies’ Center for Private Business Owners and the Family Advisory Services Practice, that offer a unique and comprehensive offering to private business owners that satisfy all of their business and personal needs, at whatever stage they are in their lifecycle. Steve is also the Founder, Chairman and CEO of The UHNW Institute, a nonprofit, independent “Think Tank” and publisher of exceptional thought leadership content for UHNW families, family offices, their advisors and the financial services industry.

Prior to joining the Firm, Steve was the Head of Family Wealth Advisors, a division of BNP Paribas / Bank of the West Wealth Management, where he built the first global, multi-family office in the U.S.. Additionally, he served on the Bank’s Senior Management Committee.

Steve previously served as CEO of Silver Bridge, President of Atlantic Trust and a Global Partner of Amvescap, President of Chase Global Asset Management and Executive Vice President of the Private Clients Group of FleetBoston Financial. He also held senior positions with Mellon Bank and KPMG, where he began his career.

Steve is the recipient of several distinguished industry awards, including *Family Wealth Report’s* Lifetime Achievement and Leading Individual in the MFO Industry and *Private Asset Magazine’s* Outstanding Contributor to the Wealth Management Industry, among others...

Professional Affiliations and Civic Involvement

- The UHNW Institute – Founder
- American Institute of Certified Public Accountants (AICPA)
- Massachusetts Society of Certified Public Accountants (MassCPAs)
- Boston College Wall Street Council
Board – Executive Committee
- Massachusetts Bar Association
- Connecticut Bar Association
- American Bar Association

Accreditations

- Certified Public Accountant (Massachusetts)
- Admitted to Massachusetts Supreme Judicial Court
- Admitted to Connecticut Supreme Judicial Court

Education

- **Boston University School of Law**
LLM degree in Taxation
- **University of Miami School of Law**
Juris Doctorate Degree
- **Boston College**
Bachelor of Arts degree in Economics and Philosophy

Contact Steve Prostano

914.980.9930 | sprostano@pkfod.com

KNOW
GREATER
VALUE®