Susan Wells Jenevein
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wellsjenevein.com

Wells Jenevein Advisory **Dallas, Texas**
Principal 2025 – present

- Advise ultra-high net wealth families on issue of governance, philanthropy family decision making and transitions.
- Consult with invest advisors on philanthropic and family engagement approaches and practices of high net worth and ultra-high net worth individuals and families
- Design strategies for registered independent advisors to serve ultra-high net wealth clients' philanthropy and family learning needs.

Tolleson Wealth Management **Dallas, Texas**
Managing Director, Philanthropy and Family Engagement 2018- 2025

- Work with UHNW families to plan and execute strategic philanthropic giving;
- Collaborate with tax consultants, financial consultants and attorneys to create financial and philanthropic plans for UHNW individuals;
- Advise not-for-profits on legal and financial matters;
- Structure philanthropic gifts on behalf of client families;
- Facilitate meetings of foundation board of directors;
- Consult with clients on creation and giving in donor-advised funds;
- Responsible for all aspects of client service covering over $180 million in funds under philanthropic advisement.
- Provide financial education, communication training and family systems overview to financial advisors.
- Facilitate communication among family members of UHNW clients regarding wealth transfer, succession planning and family transitions.

Jackson Walker LLP **Dallas, Texas**
Associate Attorney, 4/98 – 1/00

Attorney General, The State of Texas
Assistant Attorney General, 2/96 – 2/98 **Austin, Texas**

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Education

The University of Texas School of Law
Doctor of Jurisprudence, May 1995
Admitted to Texas Bar, November 1995

The University of Texas at Austin
Bachelor of Arts in Plan II with Honors, May 1992
Bachelor of Business Administration in Finance with Honors, May 1992

Community Leadership:
Host Committee, Linz Award (2018),Trustee, Family Compass (January 2018 – present) Trustee, Texas Lyceum (January 2014 – 2017), Trustee, Methodist Hospital Foundation Board (June 1, 2012 – January 1, 2016),Volunteer Luncheon Chair, Genesis Women's Shelter Luncheon Featuring Nolan Ryan and President George W. Bush (2013), Leadership Dallas, Class of 2012, President, The Alliance of the Genesis Women's Shelter (June 1, 2009 – May 31, 2010), Founding Member, The Partnership of Community Partners (2006). President, Junior League of Dallas, (2011-2012).