**Paul S. Lee  
Chief Tax Strategist  
Northern Trust**

Paul is the Chief Tax Strategist for Northern Trust Wealth Management. In this role, he leads research and strategy development as it relates to tax issues and wealth planning. Paul specializes in advising and consulting with ultra-high-net-worth families and their businesses, with a focus on complex income, transfer, and international tax issues.

Prior to joining Northern Trust in 2015, Paul served as National Managing Director of Bernstein Global Wealth Management in New York. He began his career practicing law and became a partner in the Tax, Estate Planning and Wealth Protection Group at Smith, Gambrell & Russell, LLP in Atlanta.

He received his J.D. and LLM (Taxation) degrees, with honors, from Emory University School of Law, and B.A. degrees, cum laude, in English and Chemistry from Cornell University.

Paul is a Fellow of The American College of Trust and Estate Counsel and has been inducted into the NAEPC Estate Planning Hall of Fame® and designated an Accredited Estate Planner® (Distinguished). He served as the American Bar Association Advisor to the Uniform Law Commission Uniform Fiduciary Income and Principal Act. He has spoken at the Heckerling Institute on Estate Planning, ACTEC National Meeting, Southern Federal Tax Institute, USC Institute on Federal Taxation, Notre Dame Tax and Estate Planning Institute, AICPA National Tax Conference, and the AICPA Advanced Estate Planning Conference. His articles have been published by The ACTEC Law Journal, Tax Notes Federal, Tax Notes International, BNA Tax Management Estates, Gifts & Trusts Journal, BNA Tax Management Memorandum, Estate Planning Journal, Trusts & Estates, Estate Planning & Community Property Law Journal, The Practical Tax Lawyer, Major Tax Planning, and the Emory Law Journal. Paul co-authored the law review article, "Retaining, Sustaining and Obtaining Basis," which was awarded Outstanding Law Review Article in 2016 by the Texas Bar Foundation.

He is a member of the Advisory Committee for the Heckerling Institute on Estate Planning, Bloomberg BNA Estates, Gifts and Trusts Advisory Board, and the University of Florida Tax Institute Advisory Board.