

Grace Y. Toh, Financial Professional

Grace has extensive experience in various wealth management disciplines, including private banking, tailored credit structures, traditional and alternative investments strategies, as well as estate and legacy planning. In 2008, she co-founded a boutique wealth management firm serving the high worth client base in the metropolitan Washington, D.C. region.

Previously, Grace was Senior Vice President at a number of financial institutions, including HSBC Private Bank and The Private Bank of Bank of America, now U.S. Trust, Bank of America Private Wealth Management. In such capacities, she provided financial and investment strategies to individual business owners, real estate developers, professional athletes, as well as to middle market commercial companies, law firms and medical practices. Earlier in her career, she gained international finance and marketing experience through positions with IBM and The World Bank.

Grace was raised in Geneva, Switzerland. She is a graduate of Wellesley College with a Bachelor of Arts degree in Economics and Chinese Studies. She studied management information systems and accounting at MIT's Alfred P. Sloan School of Management and received a full scholarship to obtain her Masters of Business Administration in Finance from the Jesse H. Jones School of Management at Rice University. Grace is a licensed Certified Financial Planner and holds NASD Series 7, 66 and 63. She has studied both French and Mandarin Chinese.

In addition to her professional career, Grace serves or has served on a number of non-profit boards, including the Financial Planning Association of the National Capital Area and the Wellesley College Alumnae Association, where she chaired the Nominating Committee and served on the Finance and International Connections Committees. She is also the Treasurer of International Bridges to Justice and is a National Advisor for the International Leadership Foundation. Currently, she is the Vice-Chair and member of the Executive Committee of the Wellesley Business Leadership Council Board.

Grace has been a long time supporter of the Smithsonian Institution and completed her nine-year term as a board member of Friends of the National Zoo (FONZ), a membership organization focused on conservation education and fundraising in partnership with the Smithsonian National Zoological Park. During her tenure at FONZ, she chaired the Board Governance and Nominating Committee and oversaw the complete revision of the organization's by-laws and committee structure. She also was elected as Treasurer and served on the FONZ Executive Board Committee. Grace is an active member of the Smithsonian Women's Committee, having served as Treasurer and member of the Executive Committee.