



Reginald J. Middleton

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Philanthropic Planning
Nonprofit Consulting
Private Foundations
Charitable Trusts
Life/Health Insurance
Business Solutions
Financial Education

Reggie has 37 years of experience in the financial services industry as a relational manager and subject matter expert for individuals and nonprofit organizations. He has had responsibility for private foundations, endowments private foundations, personal trusts, investment management accounts, IRA's, cemetery trusts, as well as many other personal and institutional financial solutions. He has also had responsibility for revenue and expense reporting for Wells Fargo & Company's Pennsylvania/Delaware Trust Division and its National Philanthropic practice. Currently, he is an agent and financial professional at New York

Life Insurance Company, and a consultant at Qme Spotlight Ecosystems, a branding, marketing, and digital solutions firm.

From March of 2000 through August of 2017, Reggie provided philanthropic advice, fiduciary services, investment management, sales, and client oversight for a complex book of philanthropic relationships in the Philanthropic Services Group at Wells Fargo & Company. As a Vice President and Senior Philanthropic Advisor, Reggie provided philanthropic planning for individuals and a variety of advisory services to endowment and private foundation clients. His responsibilities included representing Wells Fargo as Trustee on many grant making foundations in the Greater Philadelphia area including the W. W. Smith Charitable Trust, The Christian and Mary Lindback Foundation and the Ethel Sergeant Clark Smith Fund. His fiduciary responsibilities included the prevention, supervision and resolution of risk management and compliance issues.

Reggie has received many awards for his service to the non-profit community. In 2017, Lankenau Medical Center (Wynnewood, PA) awarded Reggie an Honorary Doctorate of Philanthropy and, upon his retirement from Wells Fargo, the Christian R. and Mary F. Lindback Foundation (Philadelphia, PA) named Reggie a Trustee Emeritus for his leadership and contributions to the foundation. His community involvement has been significant throughout his career serving in leadership positions in arts, education and religious organizations. Currently, Reggie is a member of the Board of Directors of the Rowan University Foundation where he serves as the Vice Chairman and chair of the Development Committee.

Reggie is a licensed minister and an associate pastor at his church in southern New Jersey where he leads the education department. He has been a speaker at various local and national conferences, including conferences for the National Center for Black Philanthropy and the Caribbean Conference on Philanthropy.

Reggie attended Temple University majoring in Business Administration. He is a Certified Trust and Fiduciary Advisor and a graduate of the American Bankers Association's Graduate School of Trust at Northwestern University. He is a licensed life and health insurance agent appointed by New York Life Insurance Company in Pennsylvania, New Jersey and Delaware. He is a long-time resident of Cherry Hill, NJ, and is a member of the Cherry Hill African American Civic Association and the Urban League of Greater Philadelphia.