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March 23, 2012

ON THE MOVE

Phillips Nizer and Deutsche Bank were among firms filling key positions this week.

Phillips Nizer, a New York-based law firm, has hired **Monika Jain** as counsel for their trusts and estates and tax departments. Jain focuses her practice on estate planning for high-net-worth individuals. She also advises on charitable giving and the creation of charitable entities, including private foundations.

Deutsche Bank Private Wealth Management has hired **Kevin Fernandez** and **David Grossman** as directors and client advisors in its Miami office. Fernandez joins the firm from Wells Fargo Advisors, where he was a senior vice president and financial advisor for the past 10 years. Grossman also joins Deutsche Bank from Wells Fargo Advisors, where he was a vice president and a financial advisor for the past four years.

Citi Private Bank has appointed **Robert Martin** as managing director and ultra-high-net-worth private banker for its Houston, Tex., office. With more than 30 years of banking experience in sales, lending and relationship management, Martin joins Citi from Wells Fargo, where he most recently served as senior vice president and director of client management for the southwest region.

Bank of Oklahoma Financial has enhanced its hedge fund portfolio services and solutions through a strategic partnership with **Crystal Capital Partners**. BOK Financial will now offer qualified clients Crystal's comprehensive alternative investment solution. Crystal's services include access to institutional quality hedge fund portfolios coupled with an operational infrastructure that features independent service providers for added investment oversight, hedge fund due diligence, analytical tools and portfolio construction technology.

--Kathy Lynch

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