



Steven Giacona (Speaker)  
CEO and Managing Partner, Round Table Wealth Management

Steven Giacona is a Partner and the Chief Executive Officer of Round Table Wealth Management. He is a member of the firm's Investment Committee and has over 30 years of experience in advising individuals and families on complex tax and investment matters.

His responsibilities include managing client relationships, developing risk-based asset allocation models, researching and advising on public and private investments, designing business, estate and income tax transactions, overseeing the selection of the firm's investment managers, custodians and related due diligence, and managing the firm's growth. Steven's areas of expertise include non-traditional investors, attorneys, business owners, and international families.

Steven holds a B.S. in Accounting from Marist College and a Master of Science in Taxation from Fordham University. Prior to founding Round Table in 1999, he was a senior officer at a large private bank in New York City. A Certified Public Accountant, he began his career in the tax department at a "Big 4" accounting firm, specializing in personal financial services. His expertise and background allows Steven to be proactive in complex estate planning and asset protection, US inbound investment planning, offshore trust matters including DNI/UNI, PFIC, and CFC issues, in addition to utilizing the full spectrum of investment opportunities for his clients.

He is a member of the American Institute for Certified Public Accountants (AICPA), the Economic Club of New York, the Society of Trusts & Estates Practitioners (STEP), and is a Trustee of the St. Paul's Episcopal Church Memorial Endowment Trust. He is an avid golfer and spends his free time riding motorcycles and traveling with his family.