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Alan Swerdloff
Senior Vice President
Regional Director



Contact

(212) 649-1575
aqs@capgroup.com
630 Fifth Avenue
New York, NY 10111

Alan Swerdloff is a Senior Vice President and Regional Director for Capital Group Private Client Services. Alan leads our team of wealth management professionals in New York and the Northeast Region. He and his team work directly with a select group of high net worth individuals and families to create customized plans for protecting and growing their wealth, often across multiple generations. In addition, Alan helps nonprofit foundations and endowments to pursue their long-term financial objectives through effective planning and investment management.

He joined our organization in 2009 and has nearly two decades of investment experience. Alan previously spent nine years at Bernstein Global Wealth Management as a managing director. Before that, he was a managing director at Sunrise Securities Corp. and a consultant at Citigroup, N.A.

Alan earned a JD from Fordham Law School and a BA in political science from Colgate University.

Alan is based in our New York office.