

# Biography



## Shelly Guan Chia

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Shelly Chia is a Vice President and Private Wealth Advisor I at The Private Bank. She works with a team of specialists in wealth planning, investments, risk management, trust and estate services, and banking in the greater Los Angeles region. Shelly works with high-net-worth clients to help them build, sustain, and transfer wealth based on their unique priorities.

The Private Bank is an exclusive part of Union Bank® dedicated to the financial needs of high-net-worth individuals, non-profit organizations, business owners, corporate executives, and professional service firms. The Private Bank is supported by teams of wealth management professionals who provide consultative relationships centered on the client's unique goals and dreams.

Shelly joined Union Bank in 2015 and has 20 years of experience in the financial services industry. Most recently, she was a Vice President and Senior Relationship Manager with Private Banking Wealth Management at Comerica Bank. Shelly also worked as an Assistant Vice President and Commercial Lender with Apparel and Textile Industries Middle Market Group of Comerica Bank. She also held a financial auditor position with a CPA firm.

Shelly received her Bachelor of Science degree in Accounting from University of Southern California. In addition, she also holds Series 7 and 66 securities licenses, as well as her California Life Insurance License.

Shelly is involved with the local community through her active participation in many philanthropic and professional organizations. She is currently Vice President and Treasurer of the San Gabriel Chamber of Commerce, and a member of the Hong Kong Association of Southern California. She also serves as a guest speaker for the Small Business Program at Chinatown Service Center.

Shelly lives in Temple City and enjoys spending time with family and friends. Shelly is fluent in Mandarin Chinese and Cantonese.

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Wills, trusts, foundations, and wealth planning strategies have legal, tax, accounting, and other implications. Clients should consult a legal or tax advisor.

