

Charles W. Ranson

Trusts & Estates Litigation Consulting & Expert Witness Testimony

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Professional Experience

Tiger 21 - *Managing Director and Founding Florida Chair*

Integritas Advisors - *Founder and CEO*

Atlantic Trust Pell Rudman - *Senior Vice President*

US Trust Company of Florida - *Managing Director*

JP Morgan Global Private Bank - Chase Manhattan Private Bank, (Florida) N.A.
President, Managing Director & Vice President

Bank of America - *Vice President*

Legg Mason, Merrill Lynch and Oppenheimer & Co. - *Investment Advisor*

Charles W. Ranson Consulting Group, LLC / Expert Witness Services

Mr. Ranson's **complex fiduciary case** assignments have included plaintiff and defendant national bank corporate fiduciaries, non-bank professional fiduciaries, individual fiduciaries, individual beneficiaries, multiple class beneficiaries, probate estate executors/personal representatives, probate estate beneficiaries and registered investment advisors in a fiduciary capacity.

Ranson has accepted complex case assignments nationally involving claims of:

- Breach of fiduciary duty
- Breaches of loyalty, duty of prudence
- Breach of duty of impartiality
- Trustee's failure to account
- Trustee accounting objection proceedings
- Trustee's failure to diversify in compliance with Uniform Prudent Investor Act
- Trustee's failure to administer the trust in compliance with the Uniform Principal and Income Act
- Trustee's failure to administer trust based on the terms and purpose of the trust
- Trustee's reasonable compensation litigation with beneficiaries
- Trustee's reasonable compensation opinions prelitigation
- Enforceability of nonjudicial settlement agreements between trustees and beneficiaries