

Sandra Pan

Sandra Pan has over three decades of front-line and executive experience in the financial industry. She has worked for large global institutions as well as independent investment firms, all in the capacity of advising clients to make sound financial decisions. Her clients are working professionals, self-made billionaires and those with multi-generational inherited wealth.

Sandra was part of the team that launched U.S. Trust in San Francisco. She also headed the Family Wealth group at U.S. Trust, and later was part of the Family Wealth team at First Republic. She was the Executive Director and Head of Client Services at Mt. Eden Investment Advisors, which was acquired by Evercore Wealth Management. Early in her career, she worked at Chase Manhattan Bank and Wells Fargo Bank.

Sandra was a board member of Asian Business League of San Francisco, and was Co-Head of Programming for two years. Sandra currently is a mentor for Ascend, Northern California, a non-profit professional association dedicated to enabling its members to realize their leadership potential.

Sandra holds a BS degree in Economics from UCLA. Born in Shanghai, raised in Hong Kong and Ghana, Sandra and her family now call the San Francisco Bay Area their home.