



SPRING 2020 EDITION

# THE TOP 100 PEOPLE IN FINANCE

*Featuring*

**Brendan Dunn**  
CEO, Holdun Family Office

As a fifth-generation financier, Brendan Dunn is responsible for carrying on a family legacy and for upholding a time-honored reputation for treating clients like family.

-Story on Page 6





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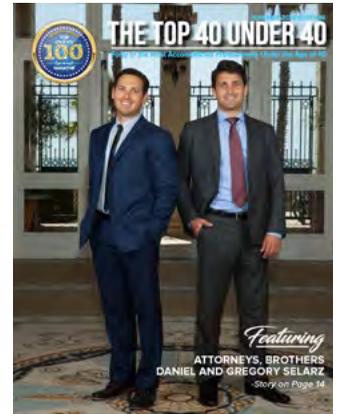
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The staff of *The Top 100 Magazine* would like to express their gratitude for having the privilege of working with the brightest, most accomplished and esteemed professionals in the finance industry.

Through the combined efforts of our account directors, writers, production staff, and artists, as well as the cooperation of everyone who is featured in this extraordinary edition, I believe we are presenting our greatest publication to date.

I know that our readers will be equally impressed by these stories and appreciate the tremendous fortitude, dedication, and perseverance of these individuals, along with the many sacrifices they have made in the pursuit of their dreams.

It is my sincere wish that each and every one of these amazing professionals continue to experience success and my pleasure to present *The Top 100 People in Finance Magazine*.

*Joseph Nunziato*  
CEO, Redwood Media

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# THE TOP 100 PEOPLE IN FINANCE

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# Andrea Baumann Lustig

President/Director of Wealth Management  
Stralem & Company, Inc.

For Andrea Baumann Lustig, nothing is more rewarding than helping clients build, protect, enjoy and pass on a legacy. As the 6th consecutive generation to work in wealth management, she carries forward the heritage of her great, great, great grandfather, who founded The Banque Levy in 1810. She follows in the footsteps of her father, an early partner in the 50-year-old firm Stralem & Company, where she serves as president and director of wealth management.

Over the years, Andrea has established herself as a thought leader, spokeswoman and strategic thinker in the wealth management industry. Under her leadership, Stralem implements a wealth management philosophy based on the principle of “participation with protection.” She works closely with families to balance growth and capital preservation tailored to their specific goals and risk tolerance. Acting as fiduciary, she creates highly personalized and comprehensive investment plans, builds portfolios using Stralem-proprietary and outside investments, and coordinates with attorneys and accountants to give clients confidence in their future. This approach helps them forgo Wall Street fads and keep focused on their long-term objectives.

Andrea graduated from Princeton University’s Woodrow Wilson School, where she earned bachelor’s and master’s degrees in international relations, and Yale University, where she received her Master of Business Administration degree. She has had an expansive career in investment banking, management

consulting and wealth management. Prior to joining Stralem, she was vice president with Bernstein Investment Research and Management, where she worked extensively with private clients. She joined Bernstein following more than a decade at Booz, Allen & Hamilton, Inc., an international management consulting firm, where she was a principal in the strategy practice and director of operations for the financial services practice in the United States and in Europe. She joined Booz-Allen after having been a financial analyst in mergers and acquisitions at Morgan Stanley & Co. Incorporated and an associate in investment banking at Jefferies & Co.

An advocate for honoring tradition while embracing change, Andrea supports missions that matter. She is a member of the board of trustees of Albert Einstein College of Medicine and of Park Avenue Synagogue, where she chaired the record-breaking capital campaign and recently served as vice president. She is also president of the Association for the Restoration of Jewish Works and Institutions in France, founded in 1943 to support Jewish life in France. In addition, Andrea has been the co-chair of annual giving for the Princeton Class of 1980 for the past 20 years. She is an advisory board member of Yale School of Management’s International Center for Finance, a member of the scholarship committee for Le Rosey, and a steering committee member of the Socrates Society of the Aspen Institute. She is also a former trustee of the Horace Mann School, where she served as president of the Parents’ Association.

With pride and purpose, Andrea understands the value of family legacy and strives in every way to continue the tradition of giving back and paying forward in an effort to make the world a better place.

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