



As the National Director of Family Governance at Key Bank, Carey Spencer is responsible for serving as the Family Wealth thought leader on all family dynamic, philanthropic, and family governance issues including all strategies related to developing and preparing family members to responsibly manage generational wealth. She closely coordinates with the family wealth team to deliver exceptional family legacy, educational, and philanthropic experiences. Carey joined Key in 1986 and has been providing financial planning services for more than 30 years.

Previously Carey served as a Family Wealth Strategist working exclusively with individuals and families of significant wealth across generations. She leveraged her experience and expertise to manage complex estate, tax, and integrated investment strategies. She also ensured that her clients received access to the full array of our family office capabilities.

Carey worked closely with her clients to understand their goals and priorities. Her in depth knowledge of investment management and trust strategies ensured that the best solutions were carefully planned and implemented.

She earned a BBA from Cleveland State University and an MFP from David Myers University. She holds RFP®, CWS® and HDP designations, and is an award recipient of the Achiever's Club, President's Club, and Signature Circle. She is a member of the board of trustees for the Cleveland Institute of Art.