



Michelle Hong

Counsel

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Philadelphia, PA: 215.564.8545

With more than 25 years of experience in the financial and legal services industry, including at a Fortune 500 bank and at global law firms, Michelle Hong is well-versed in providing informed, multifaceted counsel in all aspects of estate planning and wealth management. She advises on financial, legal, governance and philanthropic matters on behalf of institutions and high-net-worth individuals and families. Her disciplined approach to financial matters, coupled with her legal acuity, makes her a trusted adviser for establishing legacies and preserving and transferring wealth across generations.

Michelle counsels clients on trusts and estates, charitable giving and family office matters. She has advised individuals and families on federal, state and international tax and business issues. Michelle has also administered complex trusts and estates, including preparing estate tax returns and representing trustees in litigation.

Michelle has an extensive history serving as an independent corporate director, board member and/or trustee for a host of for-profit and nonprofit organizations across the Philadelphia region. Her experience informs her advice to private foundations and public charities on matters relating to formation, dissolution, governance, compliance and institutional advancement.

Notably, Michelle was a founding partner of the Philadelphia office of a global financial institution that provides asset servicing, investment management and wealth management services. She was previously senior vice president at one of the oldest and largest private banks in the United States. Michelle also was an associate in the private client practices of two Am Law 20 firms.

Community Impact

Michelle is deeply devoted to the Philadelphia community and serves on a number of boards for both for-profit and nonprofit organizations. She is a former board chair of Philabundance, the largest hunger relief organization in the Philadelphia region, and has served on boards and committees for many other organizations, including Main Line Health, Vision 2020, Center City District Foundation, Independence Public Media Foundation, Pig Iron Theatre Company and the Children's Hospital of Philadelphia.

She was appointed by former Pennsylvania Gov. Tom Wolf to serve on the Governor's Advisory Commission on Asian Pacific American Affairs from 2019-21; in that role, she

Services

- Trusts, Estates & Private Client
- Financial Services
- Corporate
- Tax

Education

- Harvard Law School (J.D.)
 - *Harvard Law Review*
- Duke University (B.A.)

Admissions

- New York
- Pennsylvania

helped represent Asian American and Pacific Islander (AAPI) communities across the state.

Memberships

- Independent Director, PECO
- Independent Director, WSFS Financial Corporation
- Board Member, William Penn Foundation
- Board Member, WHY?
- Board Member, National Association of Corporate Directors, Philadelphia chapter
- Member, Forum of Executive Women
- Member, International Women's Forum
- Former Member, Executive Committee, Philadelphia Bar Association Probate and Trust Law Section

Recognitions

- AAPI Power Player, *Metro Philadelphia* (2024)
- Woman of Distinction, *Philadelphia Business Journal* (2020)

Featured Speaking Engagements

- Moderator, "Cyber War Game: The Board's Role in Crisis Preparation and Response," NACD Philadelphia

Clerkships

Clerkship to U.S. District Judge Mary McLaughlin of the Eastern District of Pennsylvania

Publications

Letters of Wishes in Pennsylvania Estate Planning

The Legal Intelligencer

May 7, 2026