



Lincoln Banks has been a private professional fiduciary serving San Diego County for nearly 25 years, having succeeded his parents who founded Banks & Banks in 1980. He administers sophisticated estate plans and manages trust portfolios consisting of commercial and residential real estate, business interests, securities, and other financial and personal assets. He possesses the skill and experience to successfully navigate the challenges that confront fiduciaries, from complex tax issues, to family controversies, to sensitive business transactions.

Lincoln received a Bachelor of Arts in Business Economics from the University of California at Santa Barbara. After returning to San Diego in 2000 to join Banks & Banks, Lincoln achieved his Master of Science degree from San Diego State University, as well as earning Certified Public Accountant and Certified Financial Planner designations. He was one of the first in California to receive the California Licensed Professional Fiduciary designation.

Banks & Banks Fiduciary Services was founded nearly 40 years ago by Phillip “Terry” Banks, following his 13 year career with a major bank trust department, in order to deliver trust and estate administration services with a higher level of personal attention and responsiveness to clients than could be provided by a large corporate trust department.

Lincoln H. Banks, CPA, CFP® Private Professional Fiduciary

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EDUCATION & CREDENTIALS

- California Licensed Professional Fiduciary
- Certified Public Accountant
- Certified Financial Planner
- University of California, Santa Barbara: BA Business Economics, Accounting
- San Diego State University: MS Financial and Tax Planning

PROFESSIONAL ORGANIZATIONS

- Estate Planning Council of San Diego
- American Institute of Certified Public Accountants
- Professional Fiduciaries Association of California

APPOINTMENTS AND SERVICES

Lincoln is fully licensed and bondable for appointment as Trustee or Successor Trustee for various types of personal and charitable trusts, private foundations, and as administrator or executor of decedent estates.