



Gina M. Pereira, B.A.(Hons), LL.B., TEP

Managing Director, Client & Fiduciary Stewardship

Gina is a true global citizen who has lived and worked in more than half a dozen international financial centres worldwide. She possesses a sophisticated international background and experience in law, wealth management, and philanthropy. Gina is a tireless advocate for the responsible stewardship of wealth and frequently writes and speaks on the subject. In 2010, alongside her law practice, she founded and ran Dana Philanthropy, a consultancy firm offering strategic philanthropy, mission-aligned and impact investing services. Gina joined Meritus in 2021 and runs the client side of the business, leading the Trust and Corporate Administration teams in her role as Managing Director, Client and Fiduciary Stewardship, with passion, focus and a desire to meaningfully add value for our client families.

Gina's Credentials

- Bachelor of Arts (Hons)
- Bachelor of Laws
- Trained with Blake, Cassels & Graydon LLP in Toronto
- Admitted to the bar of the Law Society of Upper Canada 2002
- STEP Trust & Estate Practitioner (TEP) designation 2005
- Certificates in Innovative Financing Solutions for Resilience and Measuring Impact for Sustainability, Impact Investment Exchange, 2020
- Certificate Responsible Investment, PRI 2021
- Certificate in Fundamentals of Sustainable and Responsible Investments, US SIF 2016

Gina's Accolades

- Dana Philanthropy recipient of the esteemed STEP Private Client Award for Philanthropy Team of the Year, 2018/2019

Gina's Honours

- Past Co-chair STEP Philanthropy Advisors Special Interest Group
- Presiding Judge for the 2020 and 2022 STEP Private Client Awards
- Member of the Panel of Experts for the 2018 and 2019 STEP Private Client Awards
- Lead author of a white paper, "Family Office Dialogues on the Responsible Stewardship of Wealth: A Guide", published by STEP (2021)
- Author of the Philanthropy chapter in Globe Law & Business (2015), Family Offices: A Handbook for Advisors
- Member of the STEP Responsible Stewardship of Wealth Steering Committee
- Member of the STEP Bermuda Technical Committee
- Member of the Bermuda Association of Licensed Trustees' Technical Committee
- Past Board Member, Cardiac Health Foundation, Toronto
- Past Board Advisor, ARZU Studio Hope, Chicago

