ANNOUNCEMENTS | 05.16.2023

Choate Announces Addition of Five Partners to Wealth Management Group

Choate Hall & Stewart LLP announced today that partners Marc J. Bloostein, Cameron Casey, Kimberly E. Cohen, Jennifer S. Ewing and Geoffrey M. Mason will join Choate's Wealth Management Group from Ropes & Gray's Private Client Practice. The team represents families across multiple generations, and the businesses and charities they create and operate, and serves clients as professional trustees and as legal and financial advisors. The partners will serve as professional trustees for trusts with approximately $2 billion in assets.

Unique among wealth management firms, Choate's Wealth Management Group brings together some of the country's best lawyers, investors, tax experts, and financial administrators to provide coordinated advice for clients. Our integrated approach and exceptional talent are critical to providing highly personalized services, the hallmark of our model. Our services include independent investment advice through Choate Investment Advisors, our SEC registered investment advisor.

Choate's Wealth Management group has been in this business for more than 100 years, and today is the largest fully-integrated multi-family office in the country. Choate Investment Advisors is regularly recognized as a leading wealth advisory firm in publications such as Barron's, the Financial Times, Financial Advisor magazine, and U.S. News and World Reports, among others.

"We are thrilled that Marc, Cameron, Kimberly, Jen and Geoff are joining our integrated wealth management practice," said Bill Gelnaw and Charles Cheever, Co-Managing Partners at Choate. "They are an exceptional team who add depth to one of our core practice areas, and their addition will benefit all of our wealth management clients."

The partners will join Choate's team of more than 75 wealth management lawyers, investment professionals, tax preparers, trust and estate administrators, and business professionals. We expect that, after the addition of the new partners and based on current market conditions, Choate Investment Advisors will have more than $7.25 billion of assets under management.

Marc J. Bloostein
Partner

Cameron Casey
Practice Co-Chair, Choate Wealth

Kimberly E. Cohen
Partner

Jennifer Ewing
Partner

Geoffrey M. Mason
Partner

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