ANNOUNCEMENTS | 06.05.2023

Choate Welcomes Eighteen Attorneys and Business Professionals to Wealth Management Group

Today, Choate welcomes a comprehensive team of eighteen attorneys and business professionals to our Wealth Management Group. The team – led by partners Marc J. Bloostein, Cameron Casey, Kimberly E. Cohen, Jennifer S. Ewing and Geoffrey M. Mason – represents families across multiple generations, and the businesses and charities they create and operate, and serves clients as professional trustees, legal counsel and financial advisors.

Choate is one of the largest fully-integrated multi-family office in the United States, bringing together some of the country's best lawyers, investors, tax experts, and financial administrators to provide coordinated advice for clients. Unique among wealth management firms, our services include independent investment advice through Choate Investment Advisors, our SEC registered investment advisor. This integrated approach is critical to providing highly personalized services, the hallmark of our model.

Marc J. Bloostein, Partner | Marc provides sophisticated estate planning advice to high-net-worth individuals and families and has broad experience in all aspects of trust and estate administration, including advising fiduciaries and beneficiaries and serving as trustee for multiple family trusts. In addition, he is a trusted advisor to private equity and hedge fund principals and their firms, helping them structure funds to generate estate planning opportunities and providing them with thoughtful advice on effective wealth transfer strategies. Marc teaches an estate planning course at Harvard Law School and frequently lectures to lawyers on estate planning topics. He was instrumental in the 2012 enactment of the Massachusetts Uniform Trust Code and chaired a committee that recommended the Uniform Trust Decanting Act for adoption in Massachusetts.

Cameron Casey, Partner | Cameron provides comprehensive estate planning advice to high-net-worth individuals and families. She works with her clients to develop plans that achieve clients' goals for themselves, their families and the charitable organizations that are important to them. Strategic tax planning is integral to this process. In many cases, Cameron serves as a trustee and family advisor for clients, helping them steward family capital, foster intergenerational transitions and communicate philanthropic values. Cameron also advises tax-exempt organizations and corporate fiduciaries on charitable planning matters, including the creation and administration of charitable trusts, private foundations and donor advised funds.

Kimberly E. Cohen, Partner | Kim counsels entrepreneurs, private equity partners, venture capitalists, private and public company officers and shareholders, and high net worth individuals and families in the development and implementation of sophisticated planning techniques to aid the accumulation, preservation, and transfer of wealth. She has particular experience working with private equity and hedge fund clients in Boston and New York. In addition, Kim serves as a trustee for many family trusts and helps clients achieve their philanthropic goals through vehicles such as private foundations, charitable remainder and lead trusts, and charitable gift annuities. She is a frequent lecturer at the Heckerling Institute on Estate Planning and The American College of Trust and Estate Counsel.

Jennifer S. Ewing, Partner | Jen advises high net worth individuals, families, corporate executives, and entrepreneurs on a wide range of trusts and estates matters to create tax-efficient estate plans and deploy techniques to aid the accumulation, preservation, and transfer of wealth. In addition, Jen serves as a trustee and personal representative of many family trusts. As a fiduciary, she works closely with clients to ensure that trusts are administered in a way that is tax-efficient and responsive to their priorities and goals.

Geoffrey M. Mason, Partner | Geoff provides guidance to high net worth clients on estate planning and trust administration, as well as private equity and venture capital principals, corporate executives, and entrepreneurs to develop and implement estate and gift plans that meet their personal and financial goals in a tax-efficient manner. He serves as trustee of many family trusts, and advises trustees and beneficiaries in connection with investment, tax, and fiduciary matters. In addition, Geoff advises trust companies and major non-profit organizations with respect to charitable trust administration and planned giving.

The team will join more than 75 wealth management lawyers, investment professionals, tax preparers, trust and estate administrators, and business professionals allowing us to draw upon an even deeper base of talent to deliver sophisticated and comprehensive wealth management services to our clients.

Marc J. Bloostein
Partner

Cameron Casey
Co-Chair, Choate Wealth

Kimberly E. Cohen
Partner

Jennifer Ewing
Partner

Geoffrey M. Mason
Partner