

ANNOUNCEMENTS | 11.01.2023

Lowell Blake Team Joins Choate

Choate Hall & Stewart LLP announced today that the team of professionals at Lowell Blake & Associates (LBA) will join Choate's Wealth Management Group. Founded in Boston and serving as independent, strategic advisors to families and charities for more than 45 years, LBA shares the same focus on integrity, transparency, personal service, and disciplined investment philosophy that has guided Choate's Wealth Management Group for more than 100 years. The addition of five investment professionals, three client focused team members, and the assets under management which come with them will complement Choate's capabilities and enhance our comprehensive wealth management services.

Unique among wealth management firms, Choate's Wealth Management Group brings together some of the country's leading lawyers, investors, tax experts, and financial administrators to provide integrated independent advice for clients across the country and around the world, all from our office in Boston. Our coordinated approach and exceptional talent are critical to providing highly personalized services, the hallmark of our model. Our services include independent investment advice through our SEC registered investment advisor, Choate Investment Advisors LLC, which has been recognized as a leading wealth advisory firm in publications such as Barron's, the Financial Times, Financial Advisor magazine, Chambers High Net Worth, and U.S. News and World Reports, among others.

"We are excited to have the Lowell Blake team join our integrated wealth management practice and investment advisory service," said Charles Cheever, Choate's Co-Managing Partner. Lanny Thorndike, Co-Chair of Choate's Wealth Management Team and President of ChoateIA, added, "LBA are an exceptional group who will add to our growth and expand our individual stock, bond, and alternative investment capabilities."

The addition of Lowell Blake is part of Choate's ongoing growth strategy. Earlier this year, five partners and nearly 20 attorneys and other professionals from Ropes & Gray joined Choate's Wealth Management group, adding depth to a core practice area of the firm. After the Lowell Blake team and its clients join the firm, and based on market values as of October 24, 2023, we anticipate Choate Investment Advisors' assets under management will grow to more than \$7 billion.

About Choate

Choate has an increasingly unique one office, one city model, which provides exceptional benefits to its clients and talent. Choate focuses on a core group of areas where it represents clients across the United States and internationally on their most important matters. In addition to wealth management, Choate's areas of focus include private equity/M&A, finance and restructuring, high-stakes complex litigation (including IP litigation, government enforcement and compliance, and insurance/reinsurance), life sciences, technology companies and intellectual property. Choate's partners and practice areas consistently receive recognition in Chambers USA, The Legal 500, Best Lawyers, and Benchmark Litigation, among many others. For more information, please visit choate.com.

ChoateIA is an investment adviser registered with the SEC under the Investment Advisers Act of 1940, as amended. More information about ChoateIA including our investment strategies, fees and objectives can be found in our ADV Part 2, which is available upon request.