



Erin E. Kerr, CFA

PORTFOLIO MANAGER | CHIEF COMPLIANCE OFFICER

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Erin Kerr is a portfolio manager and chief compliance officer for Choate Wealth's Investment Management team. She focuses on investment research and works closely with clients to provide tailored solutions for their wealth management needs and investment goals. As chief compliance officer, Erin is responsible for developing and managing all compliance initiatives to ensure that ChoateIA and its employees are complying with relevant regulatory requirements and internal policies and procedures. She is a member of ChoateIA's Sustainable, Responsible and Impact Investing Committee, which identifies attractive investments that also provide a social and environmental benefit.

While attending business school, Erin worked in development at Boston University School of Law, specializing in cultivating long-term relationships with donor constituents.

Focus Areas

Choate Wealth

Professional & Community Involvement

- Member of the CFA Society Boston
- Member of the Boston Security Analysts Society

Education & Credentials

- Boston University, MBA (2011) *with honors, Beta Gamma Sigma, Finance and Strategy and Business Analysis, Questrom School of Business*
- Boston University, BA (2005) *magna cum laude, International Relations*