

Patrick J. McArdle, CTFA

FAMILY OFFICE SERVICES DIRECTOR

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Patrick McArdle joined Choate's Wealth Management Team in 2014. Prior to joining Choate, Patrick served as Vice President and Senior Trust Officer with Merrill Lynch Trust Company. In that capacity, he was lead manager for the regional New York Team with Merrill Lynch Trust Company's High Net Worth Group and was responsible for delivering fiduciary services to high net worth families, financial advisors and private wealth advisors in the New York metropolitan area. Patrick brings over 12 years of wealth management experience where he has coordinated and executed client wealth planning goals, administered personal trusts, court supervised trusts, philanthropic planning vehicles, IRAs and multi-generational wealth transfer vehicles.

At Choate, Patrick works closely with a select group of families and their advisors to develop and implement family office services tailored to meet their individual family need. In doing so, Patrick serves as a lead relationship manager in the management of personal trusts, private family foundations and family investment companies. His expertise includes oversight of asset custody, cash management, coordination of tax matters with accountants, private investment subscriptions and ongoing capital management, plans for company board meetings, and communication with immediate and extended family on personal trust matters, investment company matters and personal financial needs.

Patrick is a graduate of the Cannon Financial Institute's Trust School. He has completed administration and investment programs at the Central Atlantic School of Trust, holds a Certified Trust and Financial Advisor (CTFA) designation and is a member of the Institute of Certified Bankers.

Education & Credentials

- Cannon Financial Institute's Trust School
- University of Vermont, BA (2001) *Political Science*

Focus Areas

Choate Wealth