



## Pearl Bell

FAMILY OFFICE SERVICES DIRECTOR

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Pearl Bell works closely with trustees, estate planning lawyers, and the investment management team at Choate Wealth to coordinate the integrated delivery of family office services to high net worth families and individuals. For many clients, Pearl is their primary point of contact, and she directs many of the important aspects of their financial lives, including the coordination of bill paying, charitable and non-charitable gifting, account opening and closing, financial reporting etc. With over 30 years of experience, Pearl is engaged in the planning and then, importantly, implementing clients' estate plans and often helps support clients' major financial decisions. She also helps clients with budgeting, implementing cybersecurity protection efforts, and coordinating the benefits and services of domestic staff, among other things.

**Focus Areas**  
Choate Wealth

### Education & Credentials

- Cannon Financial Institute's Trust School (2002)
- Indiana University of Pennsylvania, BS (1993) *magna cum laude*, Accounting