



Shaune Sousa, CFP[®], CTFA

TRUST ADVISOR

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Shaune Sousa provides trust services to high net worth families and individuals. He works closely with trustees, investment and tax personnel, and estate professionals in the administration of new and existing accounts.

Prior to joining Choate, Shaune worked as a Trust Advisor at Loring Wolcott & Coolidge Trust Co. and as a Senior Portfolio Advisor at Merrill Lynch. He earned a JD from the Western New England University School of Law and a BA from Western New England University.

Focus Areas
Choate Wealth

Education & Credentials

- Western New England University School of Law, JD (2016)

Admissions

- Massachusetts
- Connecticut