RECOGNITION | 10.02.2025

Choate Wealth Ranked 12th Largest Independent Investment Adviser Firm in Massachusetts by the Boston Business Journal

Choate Wealth has been ranked 12th in the *Boston Business Journal* ("*BBJ*") 2025 "Largest Independent Investment Advisers in Massachusetts." The firm has appeared on the list, which is compiled by total asset size, for more than 10 years.

Choate Wealth is a fully integrated, high-touch, multi-family office. Our comprehensive and growing team provides coordinated and highly personalized advice for clients on legal, philanthropic, and tax planning matters, while also offering professional trustee services and independent investment management advice, with more than $9.5 billion* in assets under management provided by our subsidiary, Choate Investment Advisors LLC, an SEC-registered investment advisory firm.

Disclosures:

ChoateIA is registered as an investment advisor with the Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about the firm can be found in its Form ADV Part 2, which is available upon request by emailing info@choateia.com.

The Boston Business Journal ("BBJ") list is not indicative of future performance. Individual account experience may vary. The BBJ list is an independent listing produced by the Boston Business Journal and is based on data gathered from RIA firms, regulatory disclosures, and BBJ's research. As identified by BBJ, the listing reflected each practice's performance based primarily on assets under management. Neither the RIA firms nor their employees pay a fee to BBJ in exchange for inclusion on the list.

*AUM as of 6.30.25.

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Disclaimer: Legal advice and related services are performed by Choate Hall & Stewart LLP ("Choate"). Investment management advice is provided through our subsidiary, Choate Investment Advisors ("ChoateIA"), a SEC-registered investment advisor.