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ChoateIA Named to Barron's 2023 Top 100 RIA Firms List

Barron's ranked Choate Investment Advisors among the Top 100 in its 2023 list of the top independent advisory companies in the country. The list, published annually, is researched by Barron's staff and is based on assets managed by the firms, technology spending, staff diversity, succession planning, and other metrics.

ChoateIA has provided wealth management services to high net worth individuals and families for decades, managing $5.9 billion in discretionary and non-discretionary assets as of December 31, 2022. The firm offers independent "open architecture" investment advice and a seamless one-stop, family office approach to wealth management, providing clients with institutional quality investment management services that are fully integrated with the tax, estate planning, and other services offered by Choate, Hall & Stewart's Wealth Management Group.

Disclosures: Barron's 2023 Top 100 RIA Firms is an independent listing produced annually by Barron's (September 2023). The list is based on data gathered from RIA firms, regulatory disclosures, and Barron's research. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to Barron's in exchange for inclusion on the list.

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