RECOGNITION | 07.09.2021

ChoateIA Named to BBJ's 2021 Top Investment Adviser List

The *Boston Business Journal* ranked ChoateIA among the Top 20 in its 2021 list of the Largest Independent Investment Advisers in Massachusetts. The list, published annually, is researched locally by staff members of the *BBJ*.

ChoateIA has provided wealth management services to high net worth individuals and families for decades, and as of June 30, 2021, manages $6.3 billion in discretionary and non-discretionary assets. ChoateIA offers independent "open architecture" investment advice. The firm's seamless one-stop, family office approach to wealth management provides clients with top notch, institutional quality investment management services provided by ChoateIA that are fully integrated with the tax, estate planning, and other services offered by Choate, Hall & Stewart's Wealth Management Group.

Disclosures:

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 (July 2019). The BBJ list 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 in the list.

© 2026 Choate Wealth | Two International Place, Suite 3000 | Boston, MA 02110 | 617-248-5000

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.