ANNOUNCEMENTS | 04.10.2025

Introducing Choate Wealth

Dear Clients and Friends,

We are excited to announce the new Choate Wealth website, choatewealth.com. Our new name reflects the integrated and sophisticated service that the combined Choate Hall & Stewart and Choate Investment Advisors team has been providing our clients for years. Now, as Choate Wealth, we are integrated in name as well as approach.

Our new website provides more robust and streamlined functionality for a better user experience, including:

- Better search capabilities to find your team
- Easier navigation to the insights that you are most interested in exploring

Built on more than 100 years of history and experience, Choate Wealth is a fully-integrated, high-touch, multi-family office. We provide coordinated and highly-personalized advice for clients on estate, philanthropic, and tax planning, and we offer professional trustee services and independent investment management advice, with more than $8.7 billion of assets under management[1]. It's rare to find such a comprehensive offering under one roof.

We encourage you to visit choatewealth.com and explore our offerings, team, and insights.

As always, we thank you for trusting us to help you orchestrate your family's legacy.

If you have any questions or would like additional information, please contact your attorney or one of us.

[1] Investment management services are provided through our subsidiary, Choate Investment Advisors LLC, a SEC-registered investment advisory firm.

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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.