CHOATE
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www.choatewealth.com

Erin E. Kerr, CFA

PORTFOLIO MANAGER & CHIEF COMPLIANCE OFFICER

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Overview

Erin Kerr is a Portfolio Manager & Chief Compliance Officer at Choate Wealth. As a Portfolio Manager, Erin focuses on investment research and works closely with clients to provide tailored solutions for their wealth management needs and investment goals. As Chief Compliance Officer, Erin is responsible for developing and managing all compliance initiatives to ensure that the Choate Investment Advisors and its employees are complying with relevant regulatory requirements and internal policies and procedures. Erin is also a member of Choate Investment Advisors' Sustainable, Responsible and Impact Investing Committee, which identifies attractive investments that also provide a social and environmental benefit. Erin is a CFA Charterholder and a member of the Boston Security Analysts Society.

Erin joined Choate Wealth after receiving her MBA from the Boston University Questrom School of Business with dual concentrations in finance and strategy and business analysis. Erin graduated with honors and was inducted into Beta Gamma Sigma, an international honor society that recognizes academic achievement in the study of business for the top 20% of students. While attending business school, Erin worked in development at Boston University School of Law, specializing in cultivating long-term relationships with donor constituents. Erin previously graduated magna cum laude from Boston University with a BA in International Relations and an emphasis on European Political Economy.

Education

- Boston University Questrom School of Business, MBA (2011) with honors, Beta Gamma Sigma
- Boston University, BA (2005) *magna cum laude,* International Relations

Professional & Community Involvement

- Member, CFA Society Boston
- Member, Boston Security Analysts Society

Related Services

Investment Management

Philanthropic Planning

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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.