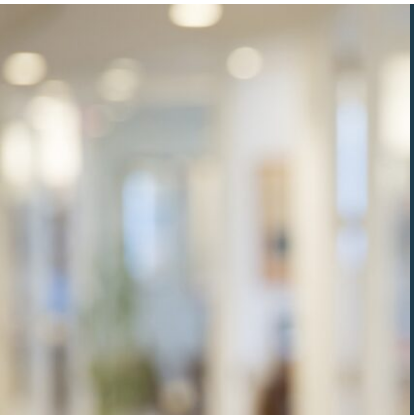


Jon R. Keenan

WEALTH MANAGEMENT OPERATIONS DIRECTOR

617-248-5054 jkeenan@choate.com

Overview

Jon is the Wealth Management Operations Director within the Wealth Operations and Technology Department, where he oversees the day-to-day processing of trust and investment-related operations. He works closely with trustees, trust administrators, portfolio managers, and tax professionals to help deliver exceptional client service and operational support.

In his role, Jon is responsible for managing the outsourced back-office operations and trust accounting systems, with a focus on regulatory reporting, reconciliation, data integrity, operational efficiency, and compliance oversight. He has also played a key role in the successful implementation and enhancement of the firm's Portfolio Management and Trade Order Management systems.

Jon joined the firm's Operations Department as an Operations Specialist and was promoted to Manager of the Operations and Reporting Department in 2023.

He earned a B.S. from Roger Williams University.

Education

- Roger Williams University, BS (2009)

Related Services

Professional Trustee and Administration Services

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