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Pearl Bell

FAMILY OFFICE DIRECTOR

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Overview

Pearl Bell works closely with Choate's trustees and estate planning lawyers and Choate Investment Advisors to coordinate the integrated delivery of family office services to high net worth families and individuals. For many clients, Pearl is their primary point of contact, and she directs many of the important aspects of their financial lives, including the coordination of bill paying, charitable and non-charitable gifting, account opening and closing, financial reporting etc. With over 30 years of experience, Pearl is engaged in the planning and then, importantly, implementing clients' estate plans and often helps support clients' major purchases. She also helps clients with budgeting, implementing cybersecurity protection efforts, coordinating yacht and flight crews, and hiring, firing, and mentoring of domestic staff, among other things.

Education

- Cannon Financial Institute's Trust School (2002)
- Indiana University of Pennsylvania, BS (1993) *magna cum laude,* Accounting

Related Services

Professional Trustee and Administration Services

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.