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Shaune Sousa, CFP®, CTFA

TRUST ADVISOR

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Overview

Shaune Sousa provides trust services to high net worth families and individuals. He works closely with trustees, investment and tax personnel, and estate professionals in the administration of new and existing accounts.

Prior to joining Choate, he worked as a Trust Advisor at Loring Wolcott & Coolidge Trust Co. and as a Senior Portfolio Advisor at Merrill Lynch.

Education

- Western New England University School of Law, JD (2016)
- Western New England University, BA (2013)

Related Services

Professional Trustee and Administration Services

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