



BROCHURE SUPPLEMENT

PART 2B OF FORM ADV

This Brochure Supplement provides information about the Boston Private Wealth LLC (“Boston Private Wealth” or the “Firm”) supervised persons and supplements the Firm’s ADV Part 2 Brochure. A summary of professional designations is included at the end of this document and is provided to assist you in evaluating certain credentials of the members of our investment and client service teams.

Please contact us at info@bostonprivate.com or 800.422.6172 if you have any questions about the contents of this Supplement, our Brochure, or if you did not receive our Brochure. Additional information about the Firm and our supervised persons is available on the Securities Exchange Commission’s website at www.adviserinfo.sec.gov.

We are a registered investment adviser with the SEC. Our registration as an investment adviser does not imply any level of skill or training.

BPW is wholly-owned by Boston Private Bank & Trust Company (“BPBTC”), which is wholly-owned by Boston Private Financial Holdings, Inc. (NASDAQ: BPFH).

Boston Private Wealth aligns the new world-class wealth management company with the broader Boston Private brand and more closely identifies with the company’s commitment to deliver the highest level of sophisticated investment management services in a personal, relationship-driven manner.

THOMAS K. ANDERSON, CFA®
EXECUTIVE VICE PRESIDENT, CHIEF OPERATING OFFICER,

YEAR OF BIRTH: 1966

EDUCATION:

- MBA, Boston College
- B.A., Colgate University

EXPERIENCE:

- Boston Private Bank & Trust Company, Chief Investment Officer and Chairman of the Bank's Investment Policy Committee, 7/2011 – 2/2015
- State Street Global Markets, LLC, Vice President, 11/2007 – 6/2011

AFFILIATIONS:

- Member of the Boston Securities Financial Analysts Society

Tom Anderson serves as the firm's Chief Operating Officer. As COO, Tom oversees the firm's business development and wealth advisory teams in the Northeast and Southeast regions. Tom's focus is on ensuring that new and existing clients receive the highest quality wealth management experience. He is a member of the Boston Private Wealth's executive team and serves on Boston Private's Operating Committee.

Contact Information: 617.912.3678. TAnderson@bostonprivate.com
Mr. Anderson is directly supervised by Paul Simons, the Firm's President.
Mr. Simons can be reached at 800.422.6172.

JEANNE K. BARRETT
MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1948

EDUCATION:

- J.D., University of California Hastings College of the Law
- B.A., Boston College

EXPERIENCE:

- Boston Private Bank & Trust Company, Trust and Investment Sales Officer, 9/2011 – 2/2015
- Borel Private Bank and Trust Company, Trust Officer, 3/2003 – 9/2011
- Practiced Law in Rhode Island and Minnesota

AFFILIATIONS:

- Member of the Peninsula Estate Planning Council and the Financial Planning Forum in Palo Alto, California

Jeanne Barrett brings over 30 years of experience assisting clients with living trusts, charitable remainder trusts, conservatorships and estates as both a trust officer and attorney. In addition to planning, Ms. Barrett has administered trusts and settled estates for clients in the San Francisco Bay Area. Ms. Barrett is also an employee of BPW's parent company, Boston Private Bank & Trust Company ("BPBTC"). As BPW is wholly owned by BPBTC, there are no conflicts related to Ms. Barrett's status as a "dual" employee, rather, the "dual" status reflects her job functions and responsibilities as they relate to BPW's and BPBTC's respective wealth management and trust & fiduciary activities, which are complementary.

Contact Information: 650.378.3634. JBarrett@bostonprivate.com
Ms. Barrett is directly supervised by Gerald Graves, the Firm's Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

AMY BORN, CFA[®], CFP[®], CIMA
MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1971

EDUCATION:

- B.S., Business Administration- Financial Services, San Diego State University

EXPERIENCE:

- Acacia Wealth Advisors - HighTower, Executive Director, 7/2016-8/2018
- Acacia Wealth Advisors, Senior Vice President, Wealth Strategies, 11/2007-7/2016
- Stone Carlie Wealth Advisors, Senior Manager, Investment Advisory Services, 02/2003-11/2007

AFFILIATIONS:

- Financial Planning Association Los Angeles, Pro Bono Committee and CFA Society Los Angeles, Wealth Management League

OTHER BUSINESS ACTIVITY:

Amy Born is a Senior Wealth Advisor responsible for delivering customized, holistic financial planning advice to Boston Private Wealth high-net-worth clients. Ms. Born has over 20 years financial industry experience. Prior to joining Boston Private Wealth, Amy was a financial planner with Acacia Wealth Advisors – HighTower in Beverly Hills, Stone Carlie Wealth Advisors in St. Louis and Ernst & Young’s Personal Financial Counseling practice in both St. Louis and Los Angeles.

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Ms. Born is directly supervised by Gerald Graves, the Firm’s Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

KRISTA CONOVER, J.D.
MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1974

EDUCATION:

- J.D., Santa Clara University School of Law
- B.A., International Relations, University of California, Davis

EXPERIENCE:

- Boston Private Bank & Trust Company, Trust and Investment Sales Officer, 9/2011 – 2/2015
- Borel Private Bank, Trust and Investment Sales Officer, 4/2004 – 9/2011
- Practiced law in San Jose, California

AFFILIATIONS:

- California State Bar

Krista Conover is responsible for assisting new and prospective clients with their trust administration needs. She enjoys working with individuals, businesses, non-profits, and their professional advisors to help them carry out their financial and estate plans. Ms. Conover brings more than ten years of trust and investment experience. Ms. Conover is also an employee of BPW’s parent company, Boston Private Bank & Trust Company (“BPBTC”). As BPW is wholly owned by BPBTC, there are no conflicts related to Ms. Conover’s status as a “dual” employee, rather, the “dual” status reflects her job functions as and responsibilities as they relate to BPW’s and BPBTC’s respective wealth management and trust & fiduciary activities, which are complementary.

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Ms. Conover is directly supervised by Gerald Graves, the Firm’s Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

SEAN CRAGAN, CFP®

MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1978

EDUCATION:

- B.S., Business Management, Providence College

EXPERIENCE:

- Banyan Partners, LLC, Senior Portfolio Advisor, 8/2013 – 2/2015
- Silver Bridge Capital Management, Senior Portfolio Advisor, 6/2008 – 8/2013

AFFILIATIONS:

- Member of the Financial Planning Association

Sean Cragan specializes in working with successful individuals and families to manage and protect their assets. He is committed to delivering individualized, fully integrated, financial solutions that aim to solve personal challenges and provide security and peace of mind. As a Senior Wealth Advisor, Sean works closely with his BPW colleagues and his clients' external advisors to provide thoughtful advice and guidance on investment, retirement, philanthropic, estate, and tax planning strategies.

Sean has nearly 18 years of experience in the wealth management and investment industries. He served as the Director of Portfolio Advisory at Boston Private, which provides thoughtful investment solutions for clients..

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Mr. Cragan is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.

Mr. Anderson can be reached at 800.422.6172.

JOSHUA CROSSMAN

EXECUTIVE MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1972

EDUCATION:

- B.B.A., University of Miami

EXPERIENCE:

- Merrill Lynch Private Banking & Investment Group, Senior Vice President, 10/2015 - 3/2017
- Barclays Wealth Management (Americas), Director, 9/2014 - 10/2015
- JP Morgan Private Bank, Vice President and Investment Team Leader, 6/2010 - 7/2014

Josh Crossman has over 20 years' experience advising wealthy individuals, families, foundations and endowments on a variety of matters, including portfolio management and construction, wealth transfer planning, lending and liquidity alternatives. He also provides clients tailored advice and solutions regarding strategic asset allocation and advises on tactical investment decisions with a core focus on customizing to clients near and long term goals.

Prior to J.P. Morgan, Josh worked for a \$1 billion private family office as its Chief Investment Officer. His past work experience also includes Fidelity Investments where he was Vice President of Capital Markets and Director of Structured Products.

Contact Information: 561.630.4600. JCrossman@bostonprivate.com

Mr. Crossman is directly supervised by Stephen Mergler, the Firm's Team Lead, Senior Wealth Advisor.

Mr. Mergler can be reached at 800.422.6172.

DISCIPLINARY INFORMATION:

As your investment adviser representative, Josh is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of him.

In January 2018, Josh entered into a Letter of Acceptance, Waiver and Consent ("AWC") with the Financial Industry Regulatory Authority ("FINRA") for the purpose of proposing a settlement to his alleged rule violation when still in the employment of the prior firm (a broker-dealer). Specifically, Josh consented to conditional sanctions and to an entry of findings resulting from the submission of an inaccurate business expense reimbursement report in the amount of approximately \$524.

Josh has no prior disciplinary history in the securities industry and there were no clients who were affected by this conduct. While Josh regrets this unfortunate incident, both he and BPW remain committed to the highest ethical standards and to the continuous offering of best services to our clients.

DUDLEY CUNNINGHAM, CFA®

MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1943

EDUCATION:

- MBA, Wharton School of Business and Finance
- B.A., University of Pennsylvania

EXPERIENCE:

- Boston Private Bank & Trust Company, Portfolio Manager, 7/1995 – 2/2015

AFFILIATIONS:

- Member of the CFA Institute and Boston Security Analyst Society

Dudley Cunningham's responsibilities include managing individual and institutional accounts, investment research, and economic analysis. He also has primary coverage responsibilities in the technology sector. In addition, he has served individually as trustee for numerous clients and as a co-trustee with corporate fiduciaries.

Contact Information: 617.912.1951. DCunningham@bostonprivate.com
Mr. Cunningham is directly supervised by Shannon Saccocia, the Firm's Chief Investment Officer.
Ms. Saccocia can be reached at 800.422.6172.

ALYSSA DO, J.D., LL.M

MANAGING DIRECTOR, WEALTH STRATEGIST

YEAR OF BIRTH: 1981

EDUCATION:

- LL.M, University of Alabama School of Law
- MBA, Finance, University of Southern California
- J.D., Glendale University College of Law
- B.A., University of California, Irvine

EXPERIENCE:

- City National Bank, Private Client Advisor, 5/2009 – 10/2017
- Wells Fargo Bank, Regional Wealth Planner, 6/2009 – 5/2009

AFFILIATIONS:

- Member of the Orange County Estate Planning Council
- Member of the Financial Planning Association
- Executive member of the Youth Policy Institute

Alyssa Do is responsible for assisting new and prospective clients with their wealth planning needs. She enjoys helping clients grow, preserve, and transfer their wealth. Ms. Do is also an employee of BPW's parent company, Boston Private Bank & Trust Company ("BPBTC"). As BPW is wholly owned by BPBTC, there are no conflicts related to Ms. Do's status as a "dual" employee, rather, the "dual" status reflects her job functions as and responsibilities as they relate to BPW's and BPBTC's respective wealth management and trust & fiduciary activities, which are complementary.

Contact Information: 424.653.5019. ADo@bostonprivate.com
Ms. Do is directly supervised by Gerald Baker, the Firm's Chief Fiduciary Officer.
Mr. Baker can be reached at 800.422.6172.

ANDREW DONAHUE

MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1967

EDUCATION:

- B.A., History, Dartmouth College

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, 12/2014 – 2/2015
- SEI Investments, Regional Director, 7/2001 – 11/2014

Andrew Donahue has over 25 years of experience partnering with high net worth individuals, families, and institutions to help them define their financial and investment goals and ensure that their assets are invested with the purpose of achieving those objectives. He has a passion for working with clients who are looking for help on planning for their changing life events. Whether it's selling a business, planning for retirement, or setting up a trust for the next generation, Mr. Donahue can advise clients on finding the best solutions for their situation.

Contact Information: 800.422.6172. ADonahue@bostonprivate.com
Mr. Donahue is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

CHRIS DUDLEY, CFP®

DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1965

EDUCATION:

- B.A., Economics and Political Science, Yale University

EXPERIENCE:

- Filigree Advisors, Partner, 10/2008 – 1/2016

AFFILIATIONS:

- President of The Dudley Foundation

Chris Dudley is responsible for helping clients align their investment portfolio with their goals, identifying asset allocation and tax-efficient strategies to diversify risk and enhance return. Chris specializes in working with professional athletes and entertainers, drawing on his own experience as a professional athlete.

Contact Information: 503.496.3230. CDudley@bostonprivate.com
Mr. Dudley is directly supervised by Gerald Graves, the Firm's Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

MICHAEL C. FINLEY
DIRECTOR, WEALTH ADVISOR

YEAR OF BIRTH: 1976

EDUCATION:

- B.S., Finance, Florida State University

EXPERIENCE:

- Boston Private Wealth, LLC, Client Advisor Associate, 10/2014 – 5/2016
- Banyan Partners, LLC, Senior Client Service Associate, 10/2013 – 10/2014
- GenSpring Family Offices, LLC, Family Service Coordinator, 6/2007 – 7/2013

AFFILIATIONS:

- Surfrider Foundation

Michael Finley integrates his 18 years of experience in the financial services industry to ensure his clients are receiving the highest level of attention and benefitting from Boston Private Wealth's scope of offerings. Mr. Finley enjoys getting to know his clients and developing suitable wealth management strategies designed for their unique investment and life goals.

Contact Information: 561.630.4600. MFinley@bostonprivate.com
Mr. Finley is directly supervised by Stephen Mergler, the Firm's Team Lead, Senior Wealth Advisor.
Mr. Mergler can be reached at 800.422.6172.

EARL M. FOSTER, PHD
MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1940

EDUCATION:

- PhD, Economics & Finance, New York University
- Master of Finance, Boston University
- Bachelor of Economics, Tufts University

EXPERIENCE:

- Banyan Partners, LLC, Senior Portfolio Manager, 11/2011 – 2/2015
- Earl M. Foster Associates, President & Chief Investment Officer, 1/1980 – 11/2011

Earl Foster is the founder and former president of an investment adviser serving high net worth individuals since 1980, which was acquired by Banyan in 2011. Mr. Foster has over 40 years of experience applying economic and financial analysis to structured investment portfolios to insulate against market risk and cope with economic cycles. His PhD dissertation analyzed the impact of monetary conditions on common stock value, and he authored a book on investing, Common Stock Investing, published in 1974.

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Mr. Foster is directly supervised by Shannon Saccocia, the Firm's Chief Investment Officer.
Ms. Saccocia can be reached at 800.422.6172.

RICHARD GRASFEDER, CFA®

MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1975

EDUCATION:

- B.S., West Point Academy
- MBA, Babson College

EXPERIENCE:

- Boston Private Wealth, Senior Equity Analyst, 11/2014-5/2015
- Boston Private Bank & Trust Company, Senior Equity Analyst, 6/2012-11/2014
- RBC Capital Markets, Research Associate, 4/2011-6/2012
- Jefferies & Company, Research Associate, 6/2006-3/2011

AFFILIATIONS:

- Member of the Boston Security Analysts Society

Richard Grasfeder serves as Portfolio Manager co-managing the Dividend Growth and Growth and Income portfolios. He previously covered the Technology sector and various subsectors in Energy, Industrials, Materials, and Utilities as an Equity Analyst, as well as managed a Technology Sector fund. Prior to joining Boston Private Wealth, Richard worked seven years on the sell-side researching the Semiconductor Capital Equipment and Solar sectors at RBC Capital Markets and the Semiconductor sector at Jefferies. He also has experience as a plant manager at Oldcastle and served as Captain in the US Army Corp of Engineers. He is active in various professional and community organizations.

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Mr. Grasfeder is directly supervised by Shannon Saccocia, the Firm's Chief Investment Officer.
Ms. Saccocia can be reached at 800.422.6172.

GERALD GRAVES

EXECUTIVE MANAGING DIRECTOR, HEAD OF WEST COAST

YEAR OF BIRTH: 1961

EDUCATION:

- B.S., Economics, University of Oregon

EXPERIENCE:

- Filigree Advisors, Founding Partners, President, Chief Compliance Officer, 3/2008 – 1/2016

AFFILIATIONS:

- Founding partner of LG Holdings, LLC

Gerald Graves leads the Firm's West Coast division, and he is responsible for overseeing Boston Private Wealth's operations in California and the Pacific Northwest. Gerald brings more than 30 years of experience in financial services, and is committed to delivering customized, comprehensive guidance to clients.

Contact Information: 503.496.3230. GGraves@bostonprivate.com
Mr. Graves is directly supervised by Paul Simons, the Firm's President.
Mr. Simons can be reached at 800.422.6172.

R. BRANDT HEITZMAN, CFP®
MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1971

EDUCATION:

- B.A., and M.A., Southern Methodist University

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, 10/2013 – 2/2015
- Rushmore Investment Advisers, Senior Portfolio Advisor, 5/2002 – 10/2013

Brandt Heitzman works with individual investors to help them realize their wealth and retirement goals. As a Certified Financial Planner™ with over 18 years experience, Brandt works closely with his colleagues to provide clients with thoughtful investment and wealth management solutions, incorporating each client's investment objectives with retirement, philanthropic, estate and tax planning strategies. Mr. Heitzman offers services to prospects and works with clients to ensure that their investments remain consistent with their objectives and respective risk tolerances.

Contact Information: 561.630.4600. BHeitzman@bostonprivate.com
Mr. Heitzman is directly supervised by Stephen Mergler, the Firm's Team Lead, Senior Wealth Advisor.
Mr. Mergler can be reached at 800.422.6172.

RYAN J. JOYCE, AIF®, CPFA
DIRECTOR, RETIREMENT PLAN ADVISOR

YEAR OF BIRTH: 1987

EDUCATION:

- B.A., Human Development and American Studies, Connecticut College

EXPERIENCE:

- Sentinel Benefits & Financial Group, Senior Plan Advisor, Account Executive, 6/2010 - 8/2015

Ryan Joyce is a Retirement Plan Advisor and specializes in advising, counseling and educating executives on critical topics including investment advisory oversight, expense analysis, risk assessment and education of participants for favorable retirement outcomes.

Previously, Ryan held various positions at Sentinel Benefits & Financial Group where he served as a Senior Plan Advisor, Account Executive and Business Development Officer. This experience provided widespread knowledge working with businesses in investment advisory and fiduciary governance all while building enduring relationships with clients.

Mr. Joyce holds a bachelor's degree in Human Development and American Studies from Connecticut College in New London, Connecticut. He also holds an Accredited Investment Fiduciary designation, a Certified Plan Fiduciary Advisor credential.

Contact Information: 617.223.0200. RJoyce@bostonprivate.com
Mr. Joyce is directly supervised by Jeff Kaufmann, the Firm's Team Lead, Senior Business Development Officer.
Mr. Kaufmann can be reached at 800.422.6172.

JEFFREY (JEFF) P. KAUFMANN

MANAGING DIRECTOR, TEAM LEAD, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1967

EDUCATION:

- B.A., Political Science, Williams College

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, 1/2011 – 2/2015
- Weiss Capital Management, Inc., Financial Advisor, 6/2008 – 12/2010
- Weiss Capital Securities, Inc., Financial Advisor , 6/2008 – 12/2010

Jeff Kaufmann has two decades of experience in the financial services industry, with special emphasis in fixed income analysis and planning. Mr. Kaufmann's primary responsibility is introducing prospective clients to Boston Private's suite of services, proposing initial portfolio allocations based on client need and risk profile, and transitioning new clients to their dedicated service team.

Contact Information: 800.422.6172. jkaufmann@bostonprivate.com

Mr. Kaufmann is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.

Mr. Anderson can be reached at 800.422.6172.

KATHLEEN KENEALY, CFP®

MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1980

EDUCATION:

- B.S., Finance, Babson College, cum laude

EXPERIENCE:

- Peak Financial Management, Wealth Advisor, 9/2014-10/2015
- Rowling & Associates, Senior Financial Advisor, 3/2012-5/2014
- Moss Adams Wealth Advisors LLC, Associate Advisor, 9/2011-2/2012
- Creative Capital Management, Inc., Special Investment Research Analyst, 7/2011-8/2011
- Pillar Financial Advisors (now Argent Wealth Management), Financial Planning Consultant, 4/2004-5/2011

AFFILIATIONS:

- Friends of the Red Cross of Massachusetts

Kathleen Kenealy brings over 10 years of experience in wealth planning and advisory services to Boston Private Wealth. She has a passion for helping people articulate and achieve their financial goals. Kathleen began her career as a Financial Planning Consultant with Pillar Financial Advisors, most recently she worked as a Wealth Advisor with Peak Financial Management where she was responsible for financial planning and strategy development for her clients.

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Ms. Kenealy is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.

Mr. Anderson can be reached at 800.422.6172

IAN (SEBASTIAN) LEBURN, CFA®
MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1974

EDUCATION:

- M.S., Economics, Florida State University
- B.S., Economics, Florida State University

EXPERIENCE:

- Banyan Partners, LLC, Director of Portfolio Strategies & Senior Portfolio Manager, 1/2011 – 2/2015
- Weiss Capital Management, Inc., Chief Investment Officer, Investment Committee Member & Portfolio Manager of The Weiss Fund, 11/2006 – 12/2010
- Weiss Capital Management, Inc., Portfolio Manager & Investment Committee Member, 1/2001 – 1/2006

Sebastian Leburn has expertise in investment leadership, including portfolio design, strategy, and management. He serves on Boston Private Wealth's Investment Policy Committee. He is a member of the CFA Society of South Florida.

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Mr. Leburn is directly supervised by Shannon Saccocia, the Firm's Chief Investment Officer.
Ms. Saccocia can be reached at 800.422.6172.

BRIAN V. LOPEZ, AIF®, CPFA
MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1972

EDUCATION:

- MBA, Bentley University
- BBA, Finance, University of Massachusetts at Amherst, Isenberg School of Management

EXPERIENCE:

- Sentinel Benefits and Financial Group, Vice President, Senior Account Executive, 1/2009 - 2/2015
- Fidelity Employer Services Company (FESCO), Vice President, Account Executive, 1/2006 - 1/2009
- Fidelity Personal Investments (FPI), Regional Consultant, 1/2000 - 1/2006

AFFILIATIONS:

- CFO Roundtable

Brian Lopez is a 20-year veteran of the financial services industry. Mr. Lopez specializes in counseling companies and executives on critical topics including investment advisory oversight, expense analysis and risk assessment.

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Mr. Lopez is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

JENNIFER K. LOVELESS, CFP®

DIRECTOR, WEALTH ADVISOR

YEAR OF BIRTH: 1983

EDUCATION:

- B.S., Business Administration, Boston University School of Management, cum laude

EXPERIENCE:

- Banyan Partners, LLC, Client Advisor, 8/2013 – 2/2015
- Silver Bridge Capital Management, LLC Client Advisor, 7/2008 – 7/2013
- Brown Brothers Harriman & Co., Senior Custody Operations Analyst, 6/2005 – 6/2008

Jennifer Loveless specializes in helping successful individuals realize their wealth and retirement goals. Ms. Loveless works with her colleagues to provide a high-level of client service to family relationships. Ms. Loveless holds the Certified Financial Planner™ designation and earned a BS in Business Management from Boston University.

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Ms. Loveless is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

CAROLYN S. MACEDO

EXECUTIVE MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1966

EDUCATION:

- MBA, Finance, Babson College, cum laude
- B.A., Finance, University of Massachusetts, Amherst

EXPERIENCE:

- Boston Private Bank & Trust Company, Senior Vice President of Business Development, 6/2012 – 2/2015
- U.S. Trust, Bank of America Private Wealth Management, Market Executive and Sales Manager, 1/2004 – 3/2011

AFFILIATIONS:

- Dana Farber Cancer Institute – Susan Smith Center for Women's Cancers Executive Council

Carolyn Macedo is responsible for working with clients to understand their financial goals and objectives and assist them in developing customized strategies that include investment management, wealth advisory, and trust services.

Contact Information: 617.912.1987. CMacedo@bostonprivate.com
Ms. Macedo is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

GARRETT MANCINI, CFA®

DIRECTOR, FIXED INCOME PORTFOLIO MANAGER

YEAR OF BIRTH: 1986

EDUCATION:

- B.S., Business Management, University of North Carolina at Chapel Hill (Kenan-Flagler Business School)

EXPERIENCE:

- Boston Private Wealth, Asst. Director, Fixed Income Trader/Analyst, 11/2015 – 7/2018
- Boston Private Bank and Trust, AVP, Senior Performance Measurement Analyst, 11/2012 – 11/2015
- Bank of America, Officer, Performance Measurement Analyst, 6/2008 – 11/2012

AFFILIATIONS:

- Member of the CFA Institute and CFA Society of Boston

Garrett Mancini is primarily responsible for managing fixed income portfolios for individual and institutional clients. His responsibilities include credit analysis, investment research, and trading of Taxable and Tax-Exempt fixed income securities. Mr. Mancini also contributes to the formulation of fixed income strategy.

Contact Information: 617.223.0246. gmancini@bostonprivate.com

Mr. Mancini is directly supervised by Bradley Wilson, the Firm's Head of Fixed Income.

Mr. Wilson can be reached at 800.422.6172

JASON J. MCPHARLIN

MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1969

EDUCATION:

- MIM, Thunderbird School of Global Management
- MBA, Nova Southeastern University
- B.S., Finance, Florida Atlantic University

EXPERIENCE:

- Banyan Partners, LLC, Senior Portfolio Manager, 10/2013 – 2/2015
- Rushmore Investment Advisors, Inc, Portfolio Manager, 1/2011- 10/2013
- Northstar Capital Management, Inc., Portfolio Manager, 1/2003-1/2011

Jason McPharlin serves as a Senior Wealth Advisor for Boston Private Wealth focusing on equity income and balanced portfolio management. In addition to working one-on-one with clients to help them achieve their investment objectives, he is responsible for conducting fundamental research and portfolio construction.

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Mr. McPharlin is directly supervised by Stephen Mergler, the Firm's Team Lead, Senior Wealth Advisor.

Mr. Mergler can be reached at 800.422.6172.

RYAN B. MCQUILKIN, CFA®

MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1983

EDUCATION:

- B.S., Mathematics, University of Massachusetts in Amherst

EXPERIENCE:

- Boston Private Bank & Trust Company, Assistant Vice President and Fixed Income Specialist, 4/2011 – 2/2015
- Bank of America Corporation, Fixed Income Analyst, 6/2007 – 4/2011

AFFILIATIONS:

- Member of the CFA Institute and the Boston Security Society

Ryan McQuilkin's responsibilities include credit analysis, investment research, and trading of Taxable and Tax-Exempt fixed income securities. Mr. McQuilkin also contributes to the formulation of fixed income strategy.

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Mr. McQuilkin is directly supervised by Bradley Wilson, the Firm's Head of Fixed Income.

Mr. Wilson can be reached at 800.422.6172.

STEPHEN K. MERGLER, JD

EXECUTIVE MANAGING DIRECTOR, TEAM LEAD, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1965

EDUCATION:

- J.D., University of Florida
- B.A., University of Florida

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, 10/2013 – 2/2015
- Rushmore Investment Advisors, Inc., ("Rushmore") Portfolio Manager, 4/2011 – 10/2013
- Northstar Capital Management, Inc., President/Portfolio Manager, 7/2000 – 4/2011

Stephen Mergler has over 20 years experience helping clients align their investment plans to best meet their financial objectives. Mr. Mergler has a background in portfolio management and construction, as a founding partner and CIO of Northstar Capital Management.

Contact Information: 561.630.4600. SMergler@bostonprivate.com

Mr. Mergler is directly supervised by Paul Simons, the Firm's President.

Mr. Simons can be reached at 800.422.6172.

LANCE MILLAR

DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1968

EDUCATION:

- B.A., International Relations, University of California, Davis

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, Investment Consultant, 1/2011 – 2/2015
- Weiss Capital Management, Inc., Financial Advisor, 3/2007 – 12/2010

Lance Millar has more than 10 years experience working with individuals, families and organizations in designing, implementing and maintaining investment portfolios for long-term success. Mr. Millar's primary responsibility is introducing prospective clients to Boston Private Wealth's suite of services, proposing initial portfolio allocations based on client need and risk profile, and transitioning new clients to their dedicated service team.

Contact Information: 561.630.4600. LMillar@bostonprivate.com
Mr. Millar is directly supervised by Gerald Graves, the Firm's Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

TODD C. MILLS, CFP®

EXECUTIVE MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1971

EDUCATION:

- M.S., Finance, Northeastern University
- B.A., History, Trinity College

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, 8/2013 – 2/2015
- Silver Bridge Advisors, Senior Client Advisor, 5/2006 – 8/2013
- Fidelity Investments, Senior Relationship Officer, 6/1996 – 5/2006

Todd Mills works with successful individuals to help them realize their wealth and retirement goals. He served in a similar capacity with Silver Bridge, which was acquired by Banyan in 2013. Mr. Mills works closely with his colleagues and clients' external advisors to provide thoughtful investment and wealth management solutions, incorporating each client's investment objectives with retirement, philanthropic, estate and tax planning strategies.

Contact Information: 617.223.0228. TMills@bostonprivate.com
Mr. Mills is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

RICHARD MULLANEY, CFP®
ASSISTANT DIRECTOR, WEALTH ADVISOR

YEAR OF BIRTH: 1988

EDUCATION:

- MBA, New England College of Business
- B.A., Mathematics, University of Connecticut

EXPERIENCE:

- Boston Private Bank, Wealth Advisor Associate, 04/2014-03/2018
- Boston Private Bank, Deposit Management Client Service Associate, 04/2012-04-2014

Richard Mullaney works closely with successful individuals to help them realize their financial goals. He specializes in wealth planning and advisory services, to lead each client down the path towards a successful retirement. Immediately prior to joining Boston Private Wealth, Mr. Mullaney worked with deposit relationships at the firm's partner Boston Private Bank. He graduated from New England College of Business with a MBA, and has also earned his Certified Financial Planner™ designation.

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Mr. Mullaney is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

MICHAEL ONORATO, CFP®
MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1971

EDUCATION:

- B.S., Bentley University

EXPERIENCE:

- U.S. Trust, Senior Portfolio Manager, 8/2009-2/2015
- Columbia Management Distributors, Inc., Client Services Manager, 1/2007-8/2009

Mr. Onorato has been in the investment business for over 15 years. Immediately prior to joining Boston Private, he was a senior portfolio manager with U.S. Trust Private Wealth Management. While there he managed equity, balanced and fixed income accounts for individuals, foundations, and institutions. Prior to that he held a position as an option specialist for High Net Worth Clients for Bank of America. Mr. Onorato graduated from Bentley College with a Bachelor of Arts degree in Finance. He has earned his Certified Financial Planner™ designation.

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Mr. Onorato is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

ROBERT N. PARK

DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1984

EDUCATION:

- B.B.A., Business Management, University of Central Arkansas, cum laude

EXPERIENCE:

- Beacon Pointe Advisors, Vice President of Client Services, 5/2014 - 5/2015
- Fidelity Investments, Investment Representative, 7/2010 - 5/2014

Robert Park is a Business Development Officer in our Boston office. His primary responsibility is introducing clients to Boston Private's suite of services. He works with clients to understand their goals and assists in developing customized solutions that include investment management, wealth advisory and trust services.

Prior to joining Boston Private Wealth, Robert was Vice President of Client Services for Beacon Pointe Advisors in Newport Beach, California. He worked with institutions and private clients to design and implement comprehensive financial plans and investment portfolios. Robert began his career at Fidelity Investments and held various investment advisory roles.

Robert graduated cum laude from the University of Central Arkansas with a Bachelor of Business Administration and minor in Spanish. He was also the quarterback of the university's Division I Football team. Rob is currently pursuing an MBA from the Yale School of Management with an emphasis in Asset Management.

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Mr. Park is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.

Mr. Anderson can be reached at 800.422.6172.

SARAH PEARCE

OFFICER, ASSOCIATE CLIENT ADVISOR

YEAR OF BIRTH: 1988

EDUCATION:

- B.B.A., Marketing Management and Economics, The University of Portland

EXPERIENCE:

- Filigree Advisors, Operations Manager, 10/2012 – 1/2016
- Riley Weiss, Program Manager, 2/2011 – 2/2012

Sarah Pearce is responsible for providing exceptional client service and operational support to high net worth individuals, families, and organizations.

Contact Information: 503.496.3230. SPearce@bostonprivate.com

Ms. Pearce is directly supervised by Gerald Graves, the Firm's Head of West Coast.

Mr. Graves can be reached at 800.422.6172.

NANCY PEREZ, CFA®

MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1965

EDUCATION:

- B.S., Finance, University of Miami, summa cum laude

EXPERIENCE:

- Banyan Partners, Senior Portfolio Manager, 11/2011 – 2/2015
- Earl M. Foster Associates, Inc, Vice President and Senior Investment Officer, 3/1999 – 11/2011

Nancy Perez's extensive and diverse background includes portfolio management, investment strategy, fundamental security valuation analysis, and performance attribution. Active in the Miami community, Ms. Perez is a long-standing member of the Women's Fund of Miami Dade and has served on their Finance, Nominations, and Grant Selection Committees. She is also an active member of the Coral Gables Chamber of Commerce and previous chair of the Women's Business Network.

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Ms. Perez is directly supervised by Shannon Saccocia, the Firm's Chief Investment Officer.
Ms. Saccocia can be reached at 800.422.6172.

ROBERT (BOB) ROBINSON

MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1962

EDUCATION:

- B.A., History University of California, Los Angeles

EXPERIENCE:

- Oppenheimer & Co. Inc., Director – Investments, The Westholme Group, 9/2014 – 10/2017
- BNY Mellon, Director, 2/2013 – 9/2014
- Welton Investment Corporation, Managing Director Business Development, 12/2007 – 1/2013
- Quality Home Loans, Sales Manager, 12/2005-12/2007

Bob Robinson has over 10 years of direct business development and client management experience in the wealth management arena, including time at BNY Mellon and Oppenheimer where he was responsible for developing relationships and providing investment management, wealth and estate planning to successful individuals and families, family offices, corporate plans, endowment and foundations. Bob is a graduate of the University of California, Los Angeles and is very active in several alumni and mentor programs.

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Mr. Robinson is directly supervised by Gerald Graves, the Firm's Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

CHRIS ROY

MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1969

EDUCATION:

- A.B., Political Science and Romance Languages, Bowdin College

EXPERIENCE:

- Windrose Advisors LLC, Director, Client Advisory, 1/2013-9/2016
- Fidelity Brokerage Services LLC, Vice President, Business Development, 10/2007-12/2012

ASSOCIATIONS:

- Serves as Trustee, Chair of Investment Committee and serves on the Finance Committee of Dexter-Southfield School.

Chris is a 24-year veteran of the asset and wealth management industries and advises endowments, foundations, and families on protecting and growing their assets. Chris serves as Chair, Investment Committee for a Boston-area independent school endowment and has addressed professional investor audiences around the country on topics ranging from Portfolio Construction to Asset-Allocation to Hedge Funds to Private Equity investing.

Prior to joining Boston Private Wealth, Chris led the Client Advisory Group at a multi-billion dollar advisory firm, where he focused on and helped advise endowments, foundations, and some of the world's most successful entrepreneurs, philanthropists, and investors. Chris also has experience with Fidelity Investments, Merrill Lynch, and Acadian Asset Management, a leading global institutional asset management firm. At Acadian, Chris worked directly for two global equity portfolio managers for five years, helping construct risk-managed globally-diversified equity portfolios.

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Mr. Roy is directly supervised by Thomas Anderson, the Firm's Chief Operating Officer.

Mr. Anderson can be reached at 800.422.6172.

SHANNON L. SACCOCCIA, CFA®, CIMA®

EXECUTIVE MANAGING DIRECTOR, CHIEF INVESTMENT OFFICER

YEAR OF BIRTH: 1978

EDUCATION:

- B.A., Brandeis University

EXPERIENCE:

- Banyan Partners, Managing Director of Search & Selection 8/2013 - 9/2014
- Silver Bridge Advisors, Director of Manager Search & Selection 5/2006-8/2013

ASSOCIATIONS:

- Boston Security Analysts Society, Investment Management Consultants Association®, 100 Women in Hedge Funds

Shannon Saccoccia serves as the firm's Chief Investment Officer, and is responsible for setting the overall investment strategy for the firm. She oversees the asset allocation, research, portfolio management, external manager search and selection, portfolio implementation, trading, and investment risk management functions. Ms. Saccoccia also works closely with both the business development team and the wealth advisor team to help construct and deliver customized wealth management solutions to meet clients' specific needs. In her capacity as Chief Investment Officer, she is a member of the firm's executive team, as well as the Investment Policy Committee, and Asset Allocation Working Group.

Ms. Saccoccia was the Director of Manager Search and Selection for Silver Bridge Advisors, which was acquired by Banyan Partners in 2013. Boston Private Wealth acquired Banyan Partners in 2014. Prior to joining Silver Bridge, Ms. Saccoccia worked at State Street Corporation, providing performance and attribution analysis for institutional investors.

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Ms. Saccoccia is directly supervised by Paul Simons, the Firm's President.

Mr. Simons can be reached at 800.422.6172.

SCOTT SWENSON

DIRECTOR, SENIOR PORTFOLIO ADVISOR

YEAR OF BIRTH: 1956

EDUCATION:

- B.A., History & Economics, Ithaca College

EXPERIENCE:

- Banyan Partners, LLC, Senior Portfolio Advisor, 1/2011 – 2/2015
- Weiss Capital Management, Inc., Financial Advisor, 6/2009 – 12/2010
- National Securities Corporation, Registered Representative, 4/2008 – 5/2009

Scott Swenson more than 25 years of experience in securities research and analysis, which has allowed him to craft strategies to meet client objectives. Mr. Swenson brings a keen understanding of technical analysis to assist investors in understanding the supply and demand equations associated with financial markets and individual stocks.

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Mr. Swenson is directly supervised by Justin Wolstenholme, the Firm's Director of Portfolio Advisory.
Mr. Wolstenholme can be reached at 800.422.6172.

DEREK R. TAM, CFP®, AWMA®

MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1984

EDUCATION:

- B.A., Business Administration, University of San Diego

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, 8/2013 – 2/2015
- Silver Bridge Advisors LLC, Client Advisor, 8/2010 – 8/2013
- H&S Financial Advisors LLC, Wealth Manager, 4/2007 – 8/2010
- The Retirement Group LLC, Retirement Planner Assistant, 9/2006 – 12/2006

Derek Tam focuses on the design and implementation of financial planning strategies for wealthy families and individuals to achieve their goals. Mr. Tam works with his colleagues to provide a high-level of client service to Boston Private Wealth's family office relationships.

Contact Information: 415.795.9252. DTam@bostonprivate.com
Mr. Tam is directly supervised by Gerald Graves, the Firm's Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

JOHN TASSONE, CAIA, JD

EXECUTIVE MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1969

EDUCATION:

- B.S., Business Management & Marketing, Cornell University - Dyson School of Applied Economics and Management
- MBA, Union College Graduate School of Management
- J.D., Albany Law School

EXPERIENCE:

- SteelBridge Private Wealth Advisors LLC, Senior Wealth Advisor and Managing Principal 4/2016 – 9/2018
- Baker Avenue Asset Management LP, Senior Wealth Advisor and Managing Partner 3/2014 – 4/2016
- Investment Banking, Self-Employed, 6/2013 to 2/2014
- Deltec Wealth Management LLC, Managing Partner, 10/2012-6/2013
- GenSpring Family Offices LLC, Chief Operating Officer of the Investment Advisory Center 11/2005-10/2012

John Tassone is an Executive Managing Director and Senior Wealth Advisor with Boston Private Wealth. Mr. Tassone brings over 20 years of experience providing advice in the areas of wealth and investment management, investment banking, estate & tax planning, and private investments.

Contact Information: 561.494.8395. jtassone@bostonprivate.com

Mr. Tassone is directly supervised by Tom Anderson, the Firm's Chief Operating Officer.

Mr. Anderson can be reached at 800.422.6172.

LISA TOMCZAK

DIRECTOR, WEALTH ADVISOR

YEAR OF BIRTH: 1971

EDUCATION:

- Canyon Springs High School, California

EXPERIENCE:

- Banyan Partners, LLC, Investment Consultant, 12/2013 – 2/2015
- Ameriprise Financial, Associate Wealth Advisor, 3/2011-12/2013
- Raymond James, Financial Advisor, 4/2007 - 2/2011

Lisa Tomczak is primarily responsible for working with clients to understand their financial goals and objectives and assist them in developing customized strategies. Ms. Tomczak brings over 11 years of Financial Industry experience to her position,

Contact Information: 561.630.4600. LTomczak@bostonprivate.com

Ms. Tomczak is directly supervised by Stephen Mergler, the Firm's Team Lead, Senior Wealth Advisor.

Mr. Mergler can be reached at 800.422.6172.

TRACY TUENS

MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1966

EDUCATION:

- B.A., International Political Economy, University of California, Berkeley

EXPERIENCE:

- Boston Private Bank & Trust Company, Managing Director, 4/2018 - present
- Ascent Private Capital Management of U.S. Bank, Managing Director, Client Advisory, 5/2016 - 3/2018
- Chequers Financial Management, LLC, Co-Director, 12/2015 – 4/2016
- Bank of New York Mellon, NA, Senior Director, Family Office, 12/2012 – 10/2015
- Abbot Downing, a Wells Fargo business, Senior Vice President, Director Client Management, Family Wealth, 2005 – 3/2012
- U.S. Trust Company, NA, Vice President, Business Development Officer, 2000 - 2005
- The Private Bank, Bank of America, Vice President, Relationship Manager, 1997 – 2000

ASSOCIATIONS:

- San Domenico School, Investment Committee Member
- BizWorld, Executive Board Member
- Game Theory Academy, Executive Board Member

Tracy Tuens is a Managing Director with Boston Private Wealth primarily responsible for new client acquisition and relationship management. With more than 25 years' experience in wealth management focused on advising both individual and family office clients, Tracy brings significant expertise and best practices to the evolving needs of wealthy families, entrepreneurs, founders and business owners.

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Ms. Tuens is directly supervised by Gerald Graves, the Head of West Coast.
Mr. Graves can be reached at 800.422.6172.

JULIA VANZLER, CFP®

DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1987

EDUCATION:

- B.A., Economics/Business and Psychology, Lafayette College
- MBA, Villanova University

EXPERIENCE:

- SEI Investments Management Corporation, Relationship Manager, 9/2009 - 6/2015

Julia Vanzler specializes in working with successful individuals and families to manage and protect their assets. She is committed to delivering individualized, fully integrated, financial solutions that aim to solve personal challenges and provide security and peace of mind. As a Client Advisor, Julia works closely with her BPW colleagues and her clients' external advisors to provide thoughtful advice and guidance on investment, retirement, philanthropic, estate, and tax planning strategies.

Contact Information: 561.630.4600. JVanzler@bostonprivate.com
Ms. Vanzler is directly supervised by Tom Anderson, the Firm's Chief Operating Officer.
Mr. Anderson can be reached at 800.422.6172.

BRADLEY K. WILSON

EXECUTIVE MANAGING DIRECTOR, HEAD OF FIXED INCOME

YEAR OF BIRTH: 1978

EDUCATION:

- B.A., Economics, Lafayette College
- Certificate holder from the Securities Industry Institute, Wharton School of Business

EXPERIENCE:

- Boston Private Bank & Trust Company, Vice President and Fixed Income Portfolio Manager, 1/2012 – 2/2015
- UBS Financial Services, Inc., Director, Senior Trader, Portfolio Management, 3/2003 – 6/2011
- Prudential Securities, Fixed Income Department, Sales Liasion, 6/2001 – 3/2003

Bradley Wilson's responsibilities include managing fixed income portfolios for individual and institutional portfolios, investment research, and trading. Mr. Wilson is also responsible for being a contributor to the formulation of fixed income policy and strategy.

Contact Information: 617.912.3758. BWilson@bostonprivate.com
Mr. Wilson is directly supervised by Shannon Saccocia, the Firm's Chief Investment Officer.
Ms. Saccocia can be reached at 800.422.6172.

JUSTIN WOLSTENHOLME, CFA[®], CFP[®]

DIRECTOR, DIRECTOR OF PORTFOLIO ADVISORY

YEAR OF BIRTH: 1986

EDUCATION:

- BBA, Trust and Wealth Management, Campbell University
- MBA, Campbell University

EXPERIENCE:

- Family Endowment Partners, LP, Director and Financial Advisor, 4/2014-5/2015
- MIP Global Inc., Director and Financial Advisor, 4/2014-5/2015
- Merrill Lynch, Pierce, Fenner & Smith Inc., Client Associate, 11/2012-2/2014
- Bank of America, Trust Administrative Officer, 11/2009-11/2012

Justin Wolstenholme is responsible for overseeing Boston Private's Portfolio Advisory team. He works in conjunction with Client Advisors to create investment strategies for clients based on each client's risk tolerance, return objectives and goals. Justin's experience includes due diligence, securities analysis, crafting financial plans and providing advice to clients regarding trusts, estate planning, retirement planning and investments.

Contact Information: 617.233.0234. JWolstenholme@bostonprivate.com
Mr. Wolstenholme is directly supervised by Shannon Saccocia, the Firm's Chief Investment Officer.
Ms. Saccocia can be reached at 800.422.6172.

SUMMARY OF PROFESSIONAL DESIGNATIONS

The below summary of professional designations is provided to assist you in evaluating the credentials noted in this brochure supplement that are held by certain investment associates of Boston Private. We encourage you also to view the specific websites noted under each designation description as well as "Understanding Professional Designations," a public resource offered by FINRA at the following website: <http://apps.finra.org/DataDirectory/1/prodesignations.aspx>

CERTIFIED INVESTMENT MANAGEMENT ANALYSTSM - CIMA[®]

Issued by: Investment Management Consultants AssociationSM (IMCA[®])

Prerequisites/Experience required:

- Submit CIMA[®] certification application and pass a background check through IMCA[®]
- Study for (100 hours) and pass a two-hour Qualification Examination

Educational Requirements:

- Successfully complete an in-person or online executive education program at a top-20 business school registered with IMCA[®]

Examination Type:

- Two examinations multiple choice

Continuing Education/Experience Requirements:

- Document a minimum of three years work experience in financial services, pass a secondary background check, pay initial certification fee, sign a license agreement, and agree to adhere to IMCA[®]'s Ethics and other ongoing standards

Website: <http://www.icma.org>

CERTIFIED FINANCIAL PLANNER - CFP[®]

Issued by: Certified Financial Planner Board of Standards, Inc.

Prerequisites/Experience required:

Candidates must meet one of the following:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years full-time personal financial planning experience

Educational Requirements:

- Complete a CFP[®]-board registered program or hold one of the following
 - CPA
 - Chartered Financial Consultant (ChFC)
 - Charter Life Underwriter (CLU)
 - Chartered Financial Analyst (CFA)
 - Attorney's License
 - Doctor of Business Administration
 - Ph.D. in business or economics

Examination Type:

- CFP[®] Certification Examination

Continuing Education/Experience Requirements:

- 30 hours every 2 (two) years

Website: <http://www.cfp.com/become>

CHARTERED FINANCIAL ANALYST – CFA[®]

Issued by: CFA[®] Institute

Prerequisites/Experience required:

Candidates must meet one of the following:

- Undergraduate degree and 4 years of professional experience involving investment decision making or
- 4 years qualified work experience (full time, but not necessarily investment related)

EDUCATIONAL REQUIREMENTS:

- Study program (250 hours of study for each of the 3 levels)

Examination Type:

- 3 course examinations

Continuing Education/Experience Requirements:

- None

Website: <http://www.cfainstitute.org/cfaprogram/Pages/index.aspx>

ACCREDITED WEALTH MANAGEMENT ADVISOR - AWMA®

Issued by:

College for Financial Planning

Prerequisites/Experience required:

- None

Educational Requirements:

- Successfully complete the program

Examination Type:

- No exam required

Continuing Education/Experience Requirements:

- Accepted for continuing education hours for CIMA®, CIMC®, CPWA®, and CRP® designations.

Website: <http://www.cffpinfo.com/crpc.htm>

CERTIFIED PLAN FIDUCIARY ADVISOR- CPFA

Issued by:

National Association of Plan Advisors (NAPA)

Prerequisites/Experience required:

- None

Educational Requirements:

- Completion of the Certified Plan Fiduciary Advisor (CPFA) examination

Examination Type:

- Final certification exam (proctored, closed book)

Continuing Education/Experience Requirements:

- 20 credits every two years

Website: <http://www.napacpfa.org>

CHARTERED ALTERNATIVE INVESTMENT ANALYST ASSOCIATION -CAIASM

Issued by:

Chartered Alternative Investment Analyst Association®

Prerequisites/Experience required:

- None

Educational Requirements:

- Successfully complete the CAIA program

Examination Type:

- 2 Multiple-choice exams
 - Level I
 - Level II

Continuing Education/Experience Requirements:

- None

Website: <https://www.caia.org/>

ACCREDITED INVESTMENT FIDUCIARY - AIF®

Issued by:

fi360®

Prerequisites/Experience required:

- 2 years relevant experience B.S. and a professional designation, or
- 5 years relevant experience B.S. or a professional designation, or
- 8 years relevant experience

Educational Requirements:

- AIF® Training (between 21 and 28 hours)
- AIF® Examination

Examination Type:

- Multiple choice

Continuing Education/Experience Requirements:

- 6 hours of CE per year

Website: www.fi360.com