



BROCHURE SUPPLEMENT



PART 2B OF FORM ADV

This Brochure Supplement provides information about the Boston Private Wealth LLC (“Boston Private Wealth” or the “Firm”) associates 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. (Form ADV Part 2)

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 associates 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 INVESTMENT OFFICER, CHIEF OPERATING OFFICER,
NATIONAL HEAD OF TRUST & FIDUCIARY OPERATIONS

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 leads Boston Private Wealth's investment consulting business, working with large and complicated investment relationships to ensure that they benefit from the Firm's full range of resources. Mr. Anderson also has direct client responsibility for several large relationships. He oversees all of Boston Private Wealth's tactical Exchange Traded Fund (ETF) strategies and is a member of the Boston Private Wealth executive team and the Firm's Investment Policy Committee. Mr. Anderson 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 Mr. Anderson's status as a "dual" employee, rather, the "dual" status reflects his 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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Mr. Anderson is directly supervised by Scott Dell'Orfano, the Firm's President.
Mr. Dell'Orfano can be reached at 800.422.6172.

ADAM BAKHASH

DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1987

EDUCATION:

- B.S., Accounting, University of Albany

EXPERIENCE:

- Boston Private Bank & Trust Company, Commercial Lender, 4/2015-12/2016
- J.P. Morgan Chase Bank, Private Client Banker, 4/2012-2/2015

ASSOCIATIONS:

- Aish Los Angeles, Executive Board Member
- Chai Lifeline Young Leaders, Board Member

Adam Bakhsh is a Senior Business Development Officer with Boston Private Wealth, he is responsible for introducing customizable wealth solutions to our prospects and clients. When joining Boston Private in 2015, Adam was a co-creator of Boston Private Bank's Entertainment Media & Sports initiative providing this niche community with valued advice and service. Having been involved in the Beverly Hills and West Los Angeles community for over five years, Adam has embedded himself as a business strategist to Entertainment Media & Sports Professionals, Real Estate Families & Developers, as well as the Professional Services industry.

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

SUSAN BLACK, CFP®

MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1953

EDUCATION:

- M.Ed., Cambridge College
- Bar Ilan University
- Wellesley College
- Harvard Business School Executive Education, Strategic Perspectives in Non-Profit Management (SPNM), Marketing for Small and Mid-sized business

EXPERIENCE:

- Sapers & Wallack Wealth Management, Managing Director, 2012 – 2015
- Credit Suisse Private Bank, Relationship Manager, 2008 - 2011
- UBS Financial Services, Financial Advisor, 2005 - 2008

AFFILIATIONS:

- Invest in Girls
- Tiffany Circle of The Red Cross
- The Boston Club
- Wellesley College Alumnae Association
- BEPC Boston Estate Planning Council

Susan Black has significant experience in marketing, management, financial services and philanthropy and as a successful entrepreneur. Her mission as a wealth manager is to help her clients align their investment strategies with their long term goals, personal beliefs and values.

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

DAVID N. BOTTOMS, J.D.

EXECUTIVE MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1939

EDUCATION:

- J.D., University of Virginia School of Law
- B.A., College of William & Mary

EXPERIENCE:

- Banyan Partners, LLC, Executive Managing Director, 1/2009 – 2/2015
- Oaktree Asset Management, President, 7/1997 – 12/2008

AFFILIATIONS:

- Fiduciary Administrative Services, Chairman
- Sam Spiegel Foundation, Director
- Madison Releasing, Director & Vice President
- Horizon Management, Inc., Director & Chairman

OTHER BUSINESS ACTIVITY:

While a partner in the law firm of Lord, Day & Lord in New York City, Mr. Bottoms acted as trustee of trusts for certain clients of the Firm. Mr. Bottoms continues as trustee of some of these trusts which are not clients of BPW. The number of hours devoted to these matters varies and does not conflict with Mr. Bottoms duties with BPW during normal trading hours.

David Bottoms has more than 30 years of experience managing investment portfolios for clients throughout the world, as a trustee for various trusts and as former president of Laidlaw Holdings Asset Management in New York City. Previously, Mr. Bottoms was a partner at Lord, Day & Lord in NYC, and has been a practicing attorney for over 40 years.

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Mr. Bottoms is directly supervised by Thomas Anderson, the Firm's Chief Investment Officer.

Mr. Anderson 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, DIRECTOR OF PORTFOLIO ADVISORY

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 works closely with Client Advisors to provide thoughtful investment solutions for clients. Mr. Cragan is responsible for constructing and transitioning client portfolios, and implementing investment strategies based on each client's specific situation, needs, and goals. He serves on Boston Private Wealth's Investment Policy Committee.

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Mr. Cragan is directly supervised by Shannon Saccocia, the Firm's Chief Investment Strategist.

Ms. Saccocia 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.

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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.

DUDLEY CUNNINGHAM, CFA®, CIC
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.

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Mr. Cunningham is directly supervised by Thomas Anderson, the Firm's Chief Investment Officer.
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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.

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Ms. Do is directly supervised by Claire Schissler, the Firm's Fiduciary Manager.
Ms. Schissler 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.

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Mr. Donahue is directly supervised by David Murphy, the Firm's Head of Wealth Advisory.
Mr. Murphy 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.

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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 16 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 Thomas Anderson, the Firm's Chief Investment Officer.
Mr. Anderson 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 Thomas Anderson, the Firm's Chief Investment Officer.
Mr. Anderson 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 Scott Dell'Orfano, the Firm's President.
Mr. Dell'Orfano can be reached at 800.422.6172.

DEIRDRE D. HALL, CFA®

MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1978

EDUCATION:

- B.S., Psychology, Duke University

EXPERIENCE:

- Boston Private Bank & Trust Company, Senior Client Advisor, 7/2012 – 2/2015
- Rockland Trust, Portfolio Manager, 11/2007 – 7/2012
- Wood Mackenzie, 1/2007 – 10/2007

AFFILIATIONS:

- Member of the Boston Security Analysts Society

Deirdre Hall has 15 years of experience working with clients to craft personalized investment management and wealth plans. Ms. Hall previously served as a Portfolio Manager with Boston Private Bank & Trust Company's wealth management and trust division.

Contact Information: 617.223.0218. DHall@bostonprivate.com
Ms. Hall is directly supervised by David Murphy, the Firm's Head of Wealth Advisory.
Mr. Murphy 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.

WILLIAM J. HINES

EXECUTIVE MANAGING DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1956

EDUCATION:

- Wharton School of Finance, Executive Studies Program
- B.A., Cornell University

EXPERIENCE:

- Boston Private Bank & Trust Company, Senior Vice President, 6/2011 – 2/2015
- State Street Bank, Senior Business and Development Officer, 7/2007 – 12/2010
- Investors Bank & Trust, Director of Sales, 9/2005 – 7/2007

AFFILIATIONS:

- Member of the Investment Management Consultants Association, Institute for Private Investors, and the Family Office Exchange

William Hines is responsible for assisting clients in developing investment strategies. He began his investment management career in New York with the Bankers Trust Company and later co-founded a private equity investment advisory firm. He also was associated with Mellon Bank's family office group, Mellon Private Capital Management. He is a former Executive Board Member of The Boy Scouts of America.

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Mr. Hines is directly supervised by Thomas Anderson, the Firm's Chief Investment Officer.
Mr. Anderson 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 he is responsible for introducing clients to Boston Private's full breadth of investment services. He 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.

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.

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Mr. Kaufmann is directly supervised by Thomas Anderson, the Firm's Chief Investment 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 David Murphy, the Firm's Head of Wealth Advisory.

Mr. Murphy 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 Thomas Anderson, the Firm's Chief Investment Officer.
Mr. Anderson 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 Investment 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.

Contact Information: 617.223.0220. JLoveless@bostonprivate.com

Ms. Loveless is directly supervised by David Murphy, the Firm's Head of Wealth Advisory.

Mr. Murphy 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.

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Ms. Macedo is directly supervised by Thomas Anderson, the Firm's Chief Investment Officer.

Mr. Anderson 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.

Contact Information: 561.630.4600. JMcPharlin@bostonprivate.com
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®

DIRECTOR, 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.

Contact Information: 617.912.1974. RMcQuilkin@bostonprivate.com
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 Scott Dell’Orfano, the Firm’s President.
Mr. Dell’Orfano can be reached at 800.422.6172.

GODELIEVE (LIEVE) MERTENS, CFA[®], CAIASM

MANAGING DIRECTOR, SENIOR PORTFOLIO MANAGER

YEAR OF BIRTH: 1962

EDUCATION:

- MBA, University of Chicago Booth School of Business, cum laude
- MSEE, from the K.U. Leuven, Belgium

EXPERIENCE:

- Boston Private Bank & Trust Company, Senior Vice President and Portfolio Manager, 3/2012 – 2/2015
- Legato Capital Management, Senior Vice President, 1/2007 – 3/2012

ASSOCIATION:

- Member of the CFA Institute, CFA Society of San Francisco and CAIA Association
- Board member at The Whistle Stop Child Development Center in Palo Alto, California

Lieve Mertens responsibilities include managing individual and institutional portfolios and developing investment policies and strategies. Ms. Mertens brings over 20 years of investment experience to her position.

Contact Information: 650.378.3635. LMertens@bostonprivate.com
Ms. Mertens is supervised by Thomas Anderson, the Firm’s Chief Investment Officer.
Mr. Anderson 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 David Murphy, the Firm's Head of Wealth Advisory.
Mr. Murphy can be reached at 800.422.6172.

TAYLOR J. MORRISON, CFP®

MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1979

EDUCATION:

- MBA & MS, Finance, Boston College
- B.A., Economics, Stonehill College of Charleston

EXPERIENCE:

- Boston Private Bank & Trust Company, Vice President of Business Development, 12/2013 – 2/2015
- Bank of America Investment, Vice President and Private Client Manager, 10/2004 – 10/2013
- Merrill Lynch, Pierce, Fenner & Smith Incorporated, Vice President and Private Client Manager, 10/2009 – 10/2013

Taylor Morrison is responsible for working with clients to understand their financial goals and objectives and develop customized strategies that include cash management, investment management, wealth advisory, and trust services. Mr. Morrison's community activities have included board responsibility and fundraising for the Alzheimer's Association. He has also been involved in fundraising activities for Stonehill College and served as an ambassador for Boston College's Graduate Studies program.

Contact Information: 617.912.4380. TMorrison@bostonprivate.com
Mr. Morrison is directly supervised by David Murphy, the Firm's Head of Wealth Advisory.
Mr. Murphy can be reached at 800.422.6172.

DAVID MURPHY

EXECUTIVE MANAGING DIRECTOR, HEAD OF WEALTH ADVISORY

YEAR OF BIRTH: 1959

EDUCATION:

- M.A., Strategic Studies, U.S. Army War College
- MBA, Finance, University of Connecticut
- B.S., Business Administration, Norwich University

EXPERIENCE:

- TD Bank, Regional Investment Director, 7/2000-7/2017
- Chase Manhattan Bank, Portfolio Manager, 4/1997 – 7/2000

David Murphy is responsible for overseeing Boston Private's Wealth Advisory team in Boston as well as driving strategic initiatives to support asset growth. David joined Boston Private from TD Bank, where he served as the New England and Metro New York Regional Investment Director, overseeing staff in eight states. Prior to that role, he was a Portfolio Manager in the Trust and Investment division of Chase Manhattan Bank where he managed assets for high net worth individuals.

Colonel Murphy also served in the U.S. Army, most recently with U.S. Special Operations Command and the International Security Assistance Forces in Afghanistan.

Contact information: 617.223.0200. DMurphy@bostonprivate.com
Mr. Murphy is directly supervised by Thomas Anderson, the Firm's Chief Investment 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.

Contact information: 617.223.0200. MOnorato@bostonprivate.com
Mr. Onorato is directly supervised by David Murphy, the Firm's Head of Wealth Advisory.
Mr. Murphy can be reached at 800.422.6172.

ROBERT N. PARK

DIRECTOR, SENIOR BUSINESS DEVELOPMENT OFFICER

YEAR OF BIRTH: 1984

EDUCATION:

- B.A., Business Administration, 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.

Contact Information: 972.599.9550. RPark@bostonprivate.com
Mr. Park is directly supervised by Thomas Anderson, the Firm's Chief Investment 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.

Contact Information: 561.630.4600. NPerez@bostonprivate.com
Ms. Perez is directly supervised by Thomas Anderson, the Firm's Chief Investment Officer.
Mr. Anderson can be reached at 800.422.6172.

NICOLE A. RALPH, MBA, CFP®

MANAGING DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1975

EDUCATION:

- MBA, Wisconsin School of Business, University of Wisconsin-Madison
- B.S., Anthropology, University of London – Goldsmiths College

EXPERIENCE:

- Innovation Consulting Group, Senior Consultant, 11/2014-10/2015
- Royal Bank of Canada Wealth Management, Project Manager, 3/2013-11/2014
- Royal Bank of Canada Wealth Management, Financial Advisor, 2/2011-3/2013
- Merrill Lynch, Financial Advisor, 5/2004-2/2011

Ms. Ralph joined BPW in 2015 and has over 15 years of experience as a global wealth advisor, specializing in holistic wealth planning for the complex lives of HNW and UHNW clients. She brings technical expertise in delivering sophisticated wealth planning solutions – investments, tax, estate planning and insurance strategies and the highest level of client service to affluent clients in various stages of life.

Contact Information: 608.310.3706. NRalph@bostonprivate.com

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

Mr. Mergler can be reached at 800.422.6172.

JILL RANCE

DIRECTOR, WEALTH ADVISOR

YEAR OF BIRTH: 1962

EDUCATION:

- Bayside High School, Bayside Queens

EXPERIENCE:

- Banyan Partners, LLC, Client Advisor, 1/2011 – 2/2015
- Weiss Capital Management, Inc., Client Service Advisor, 3/2007 – 12/2010
- Weiss Capital Securities, Inc., Client Service Advisor, 2/2005 – 12/2010

Jill Rance has been a Client Advisor with Boston Private, Banyan, and Weiss for more than 10 years. Ms. Rance knows that quality investment advisory services begin with creating personal relationships with her clients to understand their life, history, family obligations, future goals or bucket lists. She specializes in advising high net worth individuals and families by helping them navigate life's various stages on the path to achieving their financial goals.

Contact Information: 561.630.4600. JRance@bostonprivate.com

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

Mr. Mergler can be reached at 800.422.6172.

NICHOLAS D. RAVDEN

DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1978

EDUCATION:

- B.S., Finance, University of Arizona

EXPERIENCE:

- Boston Private Bank and Trust Company, Portfolio Manager, 5/2014 - 2/2015
- Merrill Lynch Pierce Fenner & Smith Wealth Management, Financial Advisor, 1/2012 - 5/2014
- Morgan Stanley, Smith Barney, Investment Advisor, 1/2011 - 11/2011
- Direct Access Partners, LLC, Trader, 10/2009 - 10/2010

Mr. Ravden is responsible for managing individual and institutional accounts, investment research and economic analysis. Nick has been in the investment business for 15 years. Immediately prior to joining Boston Private Wealth, he was a Vice President and Financial Advisor with Merrill Lynch Wealth Management. While there, he managed balanced portfolios for wealthy individuals and institutions. Prior to that, he spent ten years in New York, holding primary roles as an Associate Trader of US Treasury Repo at UBS and Vice President of Equity Swap Trading at Merrill Lynch. He also worked at the New York Stock Exchange as an execution trader and equity swap structurer.

Contact Information: 310.859.2746. NRavden@bostonprivate.com
Mr. Ravden is directly supervised by Gerald Graves, the Firm's Head of West Coast.
Mr. Graves 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.

Contact Information: 617.223.0200. RRobinson@bostonprivate.com
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:

- Windorose 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.

Contact Information: 617.223.0273. CRoy@bostonprivate.com

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

Mr. Anderson can be reached at 800.422.6172.

SHANNON L. SACCOCCIA, CFA®, CIMA®

EXECUTIVE MANAGING DIRECTOR, CHIEF INVESTMENT STRATEGIST

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 L. Saccoccia is responsible for oversight of both strategic and tactical asset allocation for the Firm. Ms. Saccoccia leads the external search, selection, and due diligence team, focused on identifying investment opportunities across all asset classes for use in portfolios alongside the Firm's proprietary capabilities. She also works closely with the business development and client advisor teams to help construct customized wealth management solutions to meet clients' specific needs. In addition to her work in the Asset Allocation Group, she is a member of the Firm's Investment Policy Committee, and writes the Firm's quarterly newsletter. Shannon also supervises the Portfolio Advisory, Manager Due Diligence, and Performance teams at Boston Private.

Contact Information: 617.223.0270. SSaccoccia@bostonprivate.com

Ms. Saccoccia is directly supervised by Scott Dell'Orfano, the Firm's President.

Mr. Dell'Orfano can be reached at 800.422.6172.

JULIA SORKIN, CFP®
DIRECTOR, 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 Sorkin 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. JSorkin@bostonprivate.com
Ms. Sorkin is directly supervised by David Murphy, the Firm's Head of Wealth Advisory.
Mr. Murphy can be reached at 800.422.6172.

MARK SPRENGER, J.D.
DIRECTOR, SENIOR WEALTH ADVISOR

YEAR OF BIRTH: 1950

EDUCATION:

- MBA, University of Wisconsin-Madison
- J.D., University of Wisconsin Law School
- B.S., Zoology, University of Wisconsin-Madison

EXPERIENCE:

- Banyan Partners, LLC, Senior Client Advisor, 10/2013 – 2/2015
- Holt-Smith Advisors, Manager of Wealth Management Services, 1/2007 – 9/2013

ASSOCIATIONS:

- Board of Trustees Member of the Milwaukee Community Foundation
- Chair of the Planned Giving Committee of the Children's Hospital of Wisconsin Foundation

Mark Sprenger enjoys helping people find the best solutions to enable them to achieve their financial and life goals. Mr. Sprenger works closely with clients to provide guidance and advice to effectively grow and utilize their wealth and to properly and efficiently transfer their wealth.

Contact Information: 561.630.4600. MSprenger@bostonprivate.com
Mr. Sprenger is directly supervised by Stephen Mergler, the Firm's Team Lead, Senior Wealth Advisor.
Mr. Mergler 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.

Contact Information: 561.630.4600. SSwenson@bostonprivate.com
Mr. Swenson is directly supervised by Sean Cragan, the Firm's Director of Portfolio Advisory.
Mr. Cragan 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.

LISA TOMCZAK

DIRECTOR, BUSINESS DEVELOPMENT OFFICER

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 was a member of Zonta International and has worked with the Palm Beach County Justice Association. Ms. Tomczak frequently works with divorced and widowed women.

Contact Information: 561.630.4600. LTomczak@bostonprivate.com

Ms. Tomczak is directly supervised by Jeff Kaufmann, the Firm's Team Lead, Senior Business Development Officer. Mr. Kaufmann can be reached at 800.422.6172

BRADLEY K. WILSON

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 Liaison, 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 Thomas Anderson, the Firm's Chief Investment Officer. Mr. Anderson can be reached at 800.422.6172.

JUSTIN WOLSTENHOLME, CFA®, CFP®

DIRECTOR, SENIOR PORTFOLIO ADVISOR

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 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 Sean Cragan, the Firm's Director of Portfolio Advisory.

Mr. Cragan 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>

CHARTERED INVESTMENT COUNSELOR – CIC

Issued by:

Investment Adviser Association

Prerequisites/Experience required:

- Hold the Chartered Financial Analyst (CFA) designation
- Demonstrate significant experience (at least 5 cumulative years) in performing investment counseling and portfolio management responsibilities
- At the time the charter is awarded, candidates must be employed by an IAA member firm in a such a position, must provide work and character references, must endorse the IAA's Standards of Practice, and must provide professional ethical information

Educational Requirements:

- Complete a CFA-board registered program

Examination Type:

- No exam required

Continuing Education/Experience Requirements:

Website: <https://www.investmentadviser.org/resources/professional-designations/cic-designation>

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>

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

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>