

BALLENTINE PARTNERS

PRESS RELEASE

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BALLENTINE PARTNERS ANNOUNCES FIVE NEW PARTNERS

WALTHAM, MA (March 14, 2018) - Ballentine Partners, a client-centric investment and wealth management firm, is delighted to announce the elevation of five new partners. This broadened employee ownership underscores our commitment to remaining independent, bringing the total number of employee owners to 19 and our partnership to employee ratio to 24%.

“These five talented individuals have demonstrated their dedication to our clients and our firm’s culture of independence and integrity,” said Drew McMorrow, President & CEO of Ballentine Partners. “They are leaders who are committed to asking the hard questions and finding the best solutions while always putting our clients’ best interests first. We are proud to welcome them to the partnership team.”

About the New Partners



STEPHEN H. HOPKINS

Stephen Hopkins is a Senior Client Advisor. He has championed our mission from long before he joined the firm and is passionate about helping our clients and their businesses achieve their goals. Stephen draws on his strategic planning and hands-on investment experience to advise complex families and their businesses.



SHEILA C. LAWRENCE, MALD, CFP®

Sheila Lawrence is a Senior Client Advisor. In addition to leading a number of client engagements, she heads our Estate Planning Knowledge Management team, educating and mentoring her colleagues and ensuring that our clients benefit from our sharing best practices throughout the firm.



JEFF POTTER

Jeff Potter is a Senior Client Advisor. He works with a number of client families with deep involvement in family-owned businesses, private equity, and inter-generational planning. Jeff has contributed to enhancing the client experience firm wide and has been instrumental in implementing a new investment reporting system.



ANJA SALORANTA, MBA

Anja Saloranta is the Chief Operating Officer of the firm. She brings a deep background in the investment industry and a unique ability to synthesize ideas and drive business initiatives across the partnership. She has been instrumental in helping the firm implement a number of developments that have enhanced our client experience.



BRUCE D. SIMON, CFA, CPWA®

Bruce Simon is the Director of Research. He leads the investment research efforts of the firm, managing the rigorous investigation and analysis of public and private investments that provide our clients with access to customized and exclusive opportunities.

BALLENTINE NORTH

Lakes Region, NH
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Wolfeboro, NH 03894

BALLENTINE HEADQUARTERS

Boston-area, MA
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BALLENTINE SOUTH

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