

PRESS RELEASE

Ballentine Partners Expands Ownership Team

WALTHAM, MA (February 1, 2015) - Ballentine Partners, an independent wealth management and investment firm, announced that Jayson S. DeAngelis has joined the ownership team. His addition brings the total number of employee owners/members to 11 and our partnership to employee ratio to 20%.



“Jayson has been an exemplary role model who has carried our values and vision to every client and colleague he has worked with,” says Drew McMorrow, President. “I am proud to welcome Jayson to our ownership team.”

Jayson is a Managing Director, Senior Client Advisor, and the Director of Business Development at the firm. In his role, Jayson leads several of the firm’s largest client engagements and is also responsible for coordinating the business development efforts across the firm. In his work directly with clients families, Jayson draws on his experience growing up and working in his own family’s business to help navigate the often complex relationship between family dynamics and the management of wealth. Prior to joining the firm in 2006, Jayson worked as a Wealth Management Advisor in Merrill Lynch’s Global Private Client group where he built a practice serving over thirty families and focused primarily on the financial planning issues faced by small business owners. Jayson graduated from George Washington University with a BBA in finance. He is a CERTIFIED FINANCIAL PLANNER™ practitioner. Jayson is a member of the CFA Institute and the Boston Security Analyst’s Society. Jayson is a competitive triathlete and an avid skier. Jayson and his wife, Elena, live in North Reading, MA with their three daughters.

Jayson joins the other members of our ownership team:



Roy C. Ballentine
CEO & Founder



Drew McMorrow
President
Ownership since 2007



Coventry Edwards-Pitt
Chief Wealth Advisory Officer
Ownership since 2011



Will Braman
Chief Investment Officer
Ownership since 2014



Claudia Shilo
Chief Financial Officer
Ownership since 2007



Kyle Schaffer
Senior Investment Advisor
Ownership since 2006



Greg Peterson
Senior Investment Advisor
Ownership since 2007



Tom Bullitt
Senior Investment Advisor
Ownership since 2013



J. Barry Tubman
Senior Client Advisor
Ownership since 2014



William R. Tickle
Senior Investment Advisor
Ownership since 2014

Ballentine Partners, LLC is an independent wealth management firm providing comprehensive investment and family office services to wealthy families and entrepreneurs. Our mission is to deliver a comprehensive, integrated approach to help clients manage their financial lives and make the best use of their resources. To learn more, please visit <https://ballentinepartners.com>.