PRESS RELEASE

Ballentine Partners Announces Two New Partners

WALTHAM, MA (April 20, 2016) - Ballentine Partners, an independent wealth management and investment firm, announced Adam Ochlis, CPA, MST and Austin Poirier, MSFP, CFA as new partners. Their addition to the ownership team brings the total number of employee partners to 14 and the partnership to employee ratio to 22%.

"Adam and Austin epitomize the diverse talent Ballentine Partners brings to all of our clients. They are both exceptional leaders, mentors, and colleagues within our firm," said Drew McMorrow, President & CEO of Ballentine Partners. "Adam possesses outstanding tax planning skills and extraordinary relationships with his clients. Overseeing investments in hedge funds and commodities, Austin utilizes his investment acumen to provide unique advice to both his clients as well as our team of investment professionals. Both are deeply dedicated to providing exemplary service to their clients and we are happy to welcome them to the firm's partnership."

Adam is a Partner and Senior Client Advisor at the firm. While responsible for multiple areas of wealth management, he has a particular expertise in income tax planning for high net worth individuals. He studies developments in tax policy and informs the firm of changes in legislation and implications for the firm's clients. Adam received a Masters in Taxation from Bentley University, his Certificate in Accounting from the University of Virginia, and a Bachelor of Arts in Economics and Communications from the University of Michigan. He is a Certified Public Accountant (CPA). Adam is on the Finance Committee of Jewish Family and Children's Service. During his free time, Adam enjoys playing golf and tennis, following New England sports, and planning his family's next vacation. He lives with his wife, Eve, and their two teenagers in Newton, MA.

Austin is a Partner and Senior Investment Advisor at the firm. In addition to his client responsibilities, Austin oversees investments in hedge funds and commodities, including public and private energy managers. Within these asset classes, Austin is responsible for formulating the firm's investment strategy, evaluating public and private investment opportunities and monitoring trends within the markets. Austin received a Master of Science in Financial Planning (MSFP) from the McCallum School of Business at Bentley University and a Bachelor of Science in Management, Summa Cum Laude, from Bentley University. Austin holds the Chartered Financial Analyst (CFA) designation and is a member of the CFA Institute, the Boston Security Analyst Society, and the Financial Planning Association of Massachusetts. Austin resides in the Boston area. In his free time, he is on the investment committee of the First Baptist Church of Westwood.

Adam and Austin join the other members of our ownership team:

Roy C. Ballentine
Executive Chairman & Founder

Drew McMorrow
President
Partner since 2007

Coventry Edwards-Pitt
Chief Wealth Advisory Officer
Partner since 2011

Will Braman
Chief Investment Officer
Partner since 2014

Claudia Shilo
Chief Financial Officer
Partner since 2007

Kyle Schaffer
Senior Investment Advisor
Partner since 2006

Tom Bullitt
Senior Investment Advisor
Partner since 2013

J. Barry Tubman
Senior Client Advisor
Partner since 2014

William R. Tickle
Senior Investment Advisor
Partner since 2014

Jayson S. DeAngelis
Senior Client Advisor
Partner since 2015

Chris Chandler
Senior Investment Advisor
Partner since 2015

Jennifer M. Eaton
Senior Client Advisor
Partner since 2015

About Ballentine Partners

Ballentine Partners is an independent wealth management firm providing comprehensive investment and family office services to wealthy families and entrepreneurs. The firm was one of the first to deliver independent, objective, and comprehensive financial advice for wealthy families 30 years ago, and continues to be a thought leader in the field. Ballentine's clients require comprehensive, integrated, and objective advice. The firm advises on more than $5.9b in assets under management (as of 12/31/2015). Ballentine scales its services to meet the breadth of clients' needs, whether it's investment management and planning for an entrepreneur or a full suite of family office services for a multigenerational family, including family meetings and education, philanthropic advising, and family office administration.