

BALLENTINE PARTNERS

PRESS RELEASE

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STEPHEN HOPKINS JOINS THE BALLENTINE PARTNERS TEAM

WALTHAM, MA (September 15, 2016) - Stephen Hopkins has joined Ballentine Partners, the independent wealth management firm, as a Shareholder and Senior Client Advisor in our flagship office located in Wolfeboro, New Hampshire.

Mr. Hopkins leads several client teams and works directly with his clients, utilizing his investment and wealth management skills to help client families achieve their goals. He reports to Drew McMorrow, Ballentine's President and CEO.

"As a longtime friend of the firm, Stephen is intimately familiar with our team and our process," said Drew McMorrow. "With his many years of investment experience and his belief in our approach, Stephen is a natural fit for our culture and our clients and we are very excited to welcome him to the team."

"I am delighted to be serving clients and am thrilled to be able to do so as part of the Ballentine team," said Stephen. "Their approach sets them apart from other firms and is the perfect next step for me."



Stephen Hopkins, CPA joined Ballentine Partners in July, as a Shareholder and Senior Client Advisor. Most recently, Mr. Hopkins was the Vice Chairman at Roundtable Investment Partners, a private investment firm focused on providing investment management and advisory services to families with large, complex investment portfolios. He was one of the founding executives who created and managed the firm and, in his most recent role, Stephen was responsible delivering strategic advice and planning, investment management, and merchant banking services to some of the firm's largest and most complex relationships. Previously, Stephen served as Chief Operating Officer and Co-Head of the Investment team. Prior to Roundtable, Stephen was a C-level executive in the asset management businesses of Goldman Sachs, JP Morgan, Citigroup, and Legg Mason. Stephen is a graduate of the University of Rhode Island and is a Certified Public Accountant (CPA).

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 \$6.1b in assets under management (as of 6/30/2016). 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.

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