

# BALLENTINE PARTNERS

## PRESS RELEASE

Contact: Monica Parks, [mparks@ballentinepartners.com](mailto:mparks@ballentinepartners.com), 781-314-1302, <https://ballentinepartners.com>

## BALLENTINE PARTNERS WELCOMES EMILY CASHMAN MAGNO

**WALTHAM, MA (November 13, 2018)** - Ballentine Partners, the client-centric investment and wealth management firm, welcomed Emily Cashman Magno as a Senior Client Advisor. Ms. Cashman Magno will be joining Ballentine's highly accomplished team to be a strategic partner to her clients, helping them to creatively solve problems and align their financial plans with their goals and values.

For the past seven years, Ms. Cashman Magno has led the Lee Family Office in Cambridge, Massachusetts, overseeing all investment, estate, legal, and philanthropic matters. Prior to this, she was a Client Advisor at SCS Financial. She brings to the Ballentine team her wealth of industry knowledge and insight working directly with families.

"We are very excited to announce that Emily Cashman Magno has joined our firm," stated Drew McMorrow, President & CEO of Ballentine Partners. "Her values are completely aligned with ours and her experience will continue to build on our ability to meet the complex needs of our clients."

"I am thrilled to join Ballentine Partners and their renowned advisors and clients," said Emily Cashman Magno. "I look forward to applying my experience to help our clients achieve their financial goals through Ballentine Partners' holistic, personal approach."



**Emily Cashman Magno** joined Ballentine Partners in early November as a Senior Client Advisor. Most recently, Ms. Cashman Magno led the Lee Family Office in Cambridge, Massachusetts, where she oversaw investment management, estate and tax planning, legal, and philanthropic matters for a single family office and foundation. Previously, she was a Client Advisor at SCS Financial, where she serviced the comprehensive wealth management needs of high net-worth families. Ms. Cashman Magno started her career in M&A advisory at KPMG, LLP. She received a Bachelor of Science in Business Administration with a concentration in Finance from Babson College. She is a member of the Boston Estate Planning Council and works closely with the Barbara Lee Family Foundation in advancing their mission of gender parity in politics and contemporary art.

### About Ballentine Partners

Ballentine Partners is a client-centric investment and wealth management firm dedicated to integrity and independence. We manage over \$6.5 billion of assets (as of 6/30/2018) for private clients who rely on us to be their most trusted advisor for all aspects of their complex financial lives. With clients ranging from entrepreneurs with \$3 million of liquid assets to multi-generational families with over \$1 billion, we customize our solutions to our clients and design our strategies with only our clients' interests in mind. We help our clients make smart decisions about their wealth, giving them the freedom to focus on the lives they want to lead.