

BOSTON PRIVATE

WEALTH ▫ TRUST ▫ PRIVATE BANKING

We bring together a full spectrum of wealth, trust, and banking services designed to give you one trusted resource to help simplify and strengthen your financial life.

Understanding The WHY of Wealth

We help wealth creators find a partner that helps them make the most of their wealth through our deep understanding of why it matters to them in the first place.

Customization Is Our Standard

Your financial needs are uniquely yours. That's why we don't "bundle" or "package" products. We listen, understand and build solutions appropriate for you.

We Make the Complex Appear Simple

Speed and agility aren't words you typically associate with a financial services firm, but for us it's just how we operate. That's why clients with complex needs trust us to get it done for them.



Meet April. This is her WHY.

For April Evans, wealth is all about paying it forward. She's spent her career investing in good businesses and most importantly, good people. As her banking partner, our approach is no different.

Our Thinking

[Read more of Our Thinking](#)



Find Business Advisors You Can Trust

Article | Insight & Opinion

Running a business shouldn't be a one-person operation. Having the right advisors at your side can help you make the correct decisions across your company. However, how do you find these advisors and be sure they're the right fit?

[Learn More](#)

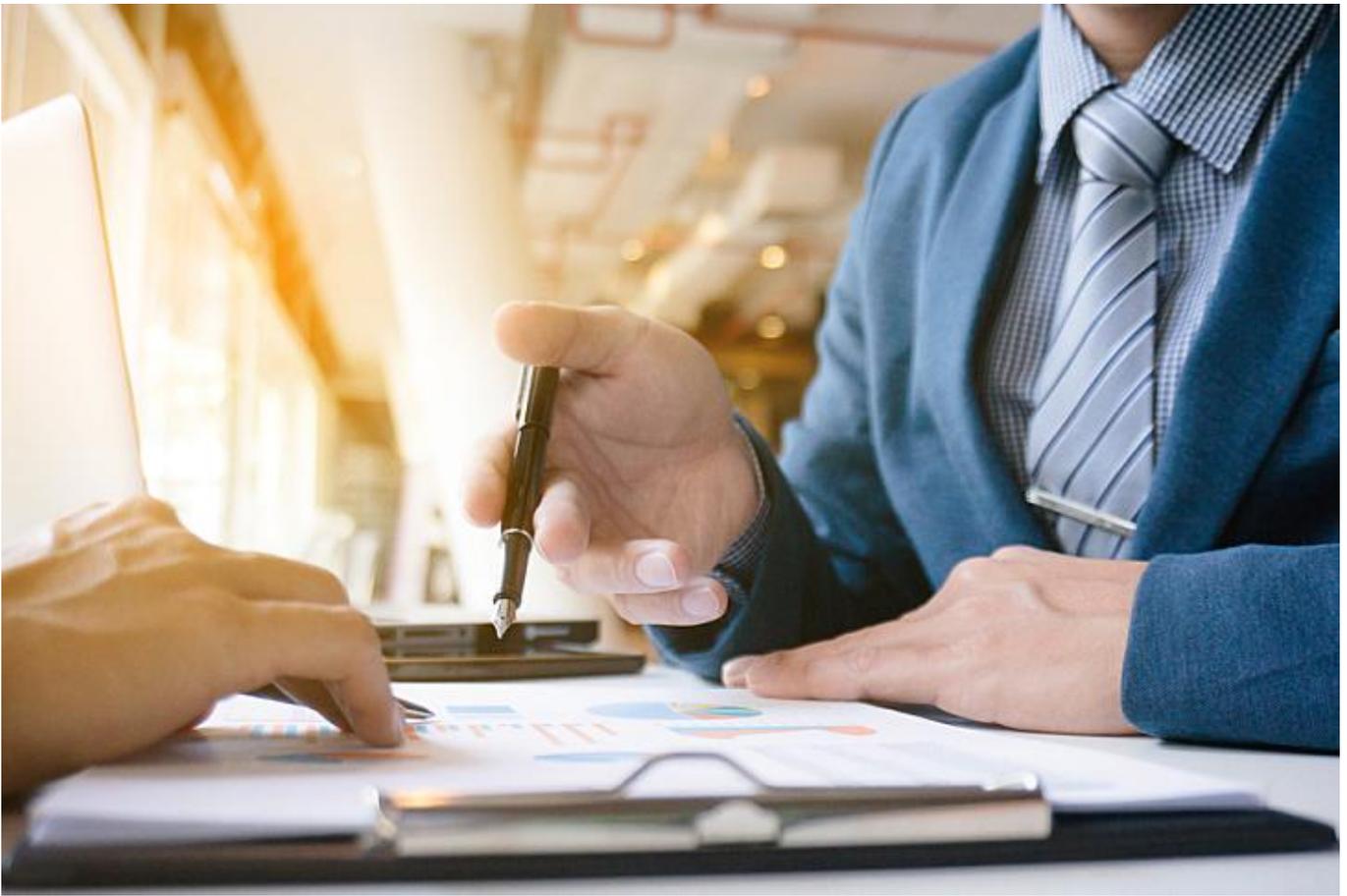


The Benefits of Offering a 10b5-1 Plan

Article | Insight & Opinion

How can the HR department support executives managing their concentrated stock positions? Working with a trusted financial advisor to establish a 10b5-1 plan is one way to help executives achieve their goals while being compliant with federal rules.

[Learn More](#)



Managing the Complexities of Your Equity Compensation

Article | Insight & Opinion

Tapping into the expertise of a trusted financial advisor to organize equity compensation can help time-pressed executives get the most of their stock while also handling some of the complex rules involved.

[Learn More](#)



Hiring Tips for a Growing Business

Article | Insight & Opinion

While your business may be growing, you may have not yet reached a point where you have a dedicated human resources department. But, you need to take on additional employees. What hiring tips can you follow to help your company grow?

[Learn More](#)

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