



Dear Clients and Friends of Banyan Partners,

I am very pleased to announce that Banyan Partners, LLC has acquired the Boston firm of Colonial Wealth Management.

With offices at 265 Franklin Street in Boston, Massachusetts, Colonial Wealth Management is a boutique Investment Advisor and Financial Counseling firm with over \$100 million in assets under management.

Colonial was founded and is managed by Jay Carroll who has been providing financial planning and investment services to individuals for over fifteen years. Jay is a graduate of Boston College, the College of Financial Planning and a fellow of the Life Underwriters Council.

Along with Mr. Carroll, we are very pleased to welcome an experienced and talented team who has helped Jay lead Colonial with many years of outstanding client service. They will be joined by our own Boston-based Managing Director, David Costigan, who has been servicing clients with Banyan since last May.

Banyan will continue to have its home office in Palm Beach Gardens, Florida, with regional offices in Boston, Manhattan, Atlanta, Memphis and Naples.

As we embark on a new year, we continue to create a company with more depth, skill and advisory capacity through the addition of our next generation of wealth managers. I remain confident that our talented professionals will break new ground for the firm, diversify our high net worth client base and expand our geographic reach.

It is my intention to continue building one of the premier Wealth and Investment Management firms in the country. We sincerely appreciate your continued loyalty and confidence.

Peter J. Raimondi

President & CEO