







#### Tri-State Trust Forum 2025

September 25-26, 2025 **ATTENDEE LIST** 

# **AmericanTCS**

Denis Hogan

# ★ <u>AssetMark</u>

Ryan Aulson

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#### **Bank of New Hampshire**

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#### **BSTC**

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# **\*** Capital Group

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## **Cetera Trust Company**

Rachael Clear

# 🛨 Cheetah

Trent Seed

#### **Clearstead Trust**

Nicolas Carter

#### **Community Bank NA**

Sean Houghton

## **D&C Home Care**

**David Young** 

## **Estateably**

Ari Broide

#### **Federated Hermes**

Brendan Kopich

### Fidelity Personal Trust Company, FSB

Christine Donlan

#### **Fiduciary Trust Company of New England**

Antonietta Brogna Katey Datillo

#### ★ <u>Fifth Third Bank</u>

John G. Harrington

#### **First National Bank**

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#### ★ GreenHill Investment Reporting

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# **Hemenway Trust Company, LLC**

**Heather Smalley** 

#### **Infovisa, Inc.**

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# ★ Jordan Park Trust Company

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Michelle Buswell

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#### McLane Middleton, PA

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**Anthony DiLoreto** 

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#### **Passumpsic Bank**

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# **Passumpsic Financial Advisors**

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## Piscataqua Savings Bank

Brianna Adams Hannah Corbett

#### **Principal Asset Management**

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## **Private Trust Group of America**

Sandra Lotito

## **Proxytrust**

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Stephen Lawler Richard Soares

#### **TRUSTworthy Consultants**

Patrick Alyward

#### **Wilmington Trust**

Craig Arsenault Amy Mayhew Max Rooney

#### <u>Wipfli</u>

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