

## Celeste O'Neill\*

*Manager of Fiduciary & Family Office Services*

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Celeste O'Neill manages Fiduciary & Family Office Services within the Goulston & Storrs Private Client & Trust Group, which acts as a custodial agent, providing centralized custody and administration of assets along with a trusted fiduciary perspective to high net worth families and individuals with complex financial needs and objectives. She has more than 25 years of experience in providing sophisticated trust administration and family office services.

Working collaboratively with professionals from multiple disciplines, Celeste and her team provide an array of services to wealthy individuals and families, as well as their business enterprises, charitable foundations and affiliates. Some of the many highly customizable personal financial services Celeste provides or oversees include:

- Working with professional trustees who are charged with the preservation and investment of various types of assets
- Facilitating comprehensive services related to the successful development and administration of estate plans, charitable foundations and nonprofit endeavors
- Master custody financial concierge services, acting as point of contact, providing centralized processing, tracking and reporting of all foreign and domestic transactions while coordinating such transactions and activities to achieve business, charitable, estate and tax planning goals
- Management and administration of partnership interests and other investments, preparation of investment agreements and other documents, timely and accurate implementation of investment decisions, processing and tracking of capital calls and distributions and more
- Investment manager liaison services to optimize wealth management through collaboration with professional trustees and an array of financial advisors, investment managers, accountants and other key asset management professionals
- Consolidated reporting and performance measurements, cash flow projections and other customized financial statements

- Facilitating valuable adjunct legal services related to corporate, employment, intellectual property, real estate, tax, and other business matters, including litigation and dispute resolution

*\*Celeste O'Neill is not a practicing attorney.*

### **Accolades**

- Chambers High Net Worth (Band 1 Firm Ranking), 2017-2020

### **Education**

- Northeastern University (B.S., 1994)