

## John (Jack) T. Cole\*

*Senior Director of Fiduciary Services*

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As the firm's Director of Fiduciary Services, Jack oversees more than \$4.0 billion in trust assets on behalf of the firm and its clients. Working alongside Goulston & Storrs' team of Private Client & Trust Group attorneys, Jack oversees the day-to-day administration of the firm's trusts group and probate department, portfolio asset allocation, custodial services, investment performance, client communication, and reporting as well as state and federal tax filings. Jack's extensive experience includes managing trust accounting systems, collecting and analyzing data, and operational management of departmental needs of trusts groups.

Prior to joining the firm, Jack was the Manager of Trust Operations at Nixon Peabody, where he oversaw operational support to trustees, trust administrators, tax preparers, portfolio managers, and external outsourcing clients. Jack's experience also includes acting as the Chief Information Officer and Trust Operations Committee Chair for the Nixon Peabody Trust Company, LLC upon the inception of that organization.

*\*John T. Cole is not a practicing attorney*

### **Accolades**

- Unsung Heroes Award/Operations Personnel, Lawyers Weekly (2011)

### **Education**

- Tufts University (B.A., 1991)
  - Economics
- American Bankers Association (Certificate)
  - Certified Trust and Financial Advisor (CTFA)
- Cannon Financial Institute (Certificate)
  - Personal Trust School
- American Bankers Association (Certificate)
  - Certified Securities Operations Professional (CSOP)

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  - Securities Operations School