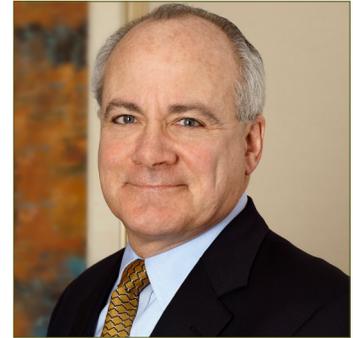




Hemenway Trust Company^{LLC}

Michael J. Puzo

Managing Director, Treasurer and Chair of the
Investment Committee
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Michael J. Puzo is a Managing Director, Treasurer and Chair of the Investment Committee of Hemenway Trust Company. Michael has over 30 years of experience in hands-on trust management, working with individuals, families and charities.

Also a partner at Hemenway & Barnes, Michael chairs the firm's Trust Investment Committee and has served as the chair of the firm's Private Client Group and Hemenway & Barnes's managing partner. Michael devotes substantial time to sophisticated estate and charitable gift planning and providing counsel to individuals on a broad range of family issues.

Representative Clients

- At HTC and H&B, Michael works with clients on a broad spectrum of personal and financial issues. These range from the family concerns and tensions that often arise in hands-on trust management; working through financial plans with older clients and those new to having financial resources; addressing the sale of the family business held in trust, with all the complexities that such a decision entails; and making sure that a client's trust planning gives voice to his or her personal objectives and values.
- On the investment front, Michael has oversight for HTC's asset management practice for individuals and families, both for private assets and retirement resources. He oversees a team of investment professionals to formulate the firm's strategic, cyclical and tactical asset allocations. He provides guidance on market implications to meet clients' family and financial goals.
- His clientele includes extended families, where he advises on generational wealth planning, asset allocation and discrete investments. He often works with clients who have lost a spouse and are coping with the new responsibilities and uncertainties that typically follow.
- He also works with entrepreneurial and business clients, who are focused on continuing asset growth, while preserving hard earned capital.

Wealth Services

Charitable Planning
Family Office
Financial Planning
Individual Retirement
Accounts
Investment
Management
Tax & Estate Planning
Trust & Fiduciary
Services

Education

JD, Boston College Law
School
BA, Boston College
(*magna cum laude*, Phi
Beta Kappa)

Bar Admissions

Massachusetts

Memberships

Boston Bar Association
Massachusetts Bar
Association

Accolades

- 2005 Founder's Medal Recipient, Boston College Law School. Awarded to a graduate who embodies the tradition of professionalism, scholarship and service that the Law School seeks to instill in its students.
- Named as a New England *Super Lawyer*

Activities and Publications

- Michael is frequently a featured expert quoted in The Wall Street Journal, The New York Times, Barron's, Boston Globe, Financial Planning, and other media sources
- Fellow, American College of Trust and Estate Counsel
- Faculty member for educational programs presented by MCLE, the American College of Trust and Estate Counsel and the Planned Giving Group of New England, where he has spoken on donative intent in charitable giving and legislative developments and the current state of federal estate and gift taxes

Community Involvement

A resident of Hingham, MA, Michael has been active in the town's civic affairs for over 30 years.

- Currently, he serves as Hingham Town Moderator, presiding at Hingham Town Meeting, with responsibility for appointing citizens to various town boards and committees
- Former Chairman, Hingham Personnel Board, with responsibility for the town's employee relations, union negotiations, and personnel policies
- Former Chairman, Search Committee for the Hingham Town Administrator and former member, Hingham Zoning Board of Appeals, the Hingham Transportation Committee, and the Hingham Water Supply Committee

Additionally Michael is involved with various organizations in a wide range of leadership capacities:

- Trustee and former Board Chair, South Shore Conservatory
- Chair, Board of Directors and Executive Committee, Boston Lyric Opera
- Member, Dean's Advisory Board, Boston College Law School

Michael Puzo's Comment on Trends in Trusts and Estates

"Having been a part of the H&B and HTC communities for my entire career has been a profound privilege. Earning a client's confidence, keeping that confidence, and helping a client through hard times – these are just some of the gifts that come with this profession. With all of the uncertainties and complexities of modern financial life, being part of a firm that is committed to the individual and his or her success gives my work true meaning."