



## Mark R. Perry

SENIOR MANAGER OF OPERATIONS

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### Services

Investment Management  
Financial Planning  
Personal Trusts & Fiduciary  
Services

### Clients

Law Firms  
Foundations, Endowments &  
Charities  
Individuals & Families

### Overview

As Senior Manager of Operations, Mark provides support for client accounts, trading, and asset movement. His twenty-plus years of industry experience include a strong knowledge of operations and compliance with a focus on providing outstanding client service.

Prior to joining LBA, Mark was the Senior Vice President of Operations and Anti-Money Laundering at Winslow, Evans & Crocker, Inc. in Boston. He was also a compliance specialist and managed a proprietary mutual fund trading group at Ameriprise in Minneapolis.

Mark is a Certified Anti-Money Laundering Specialist (CAMS) and currently serves on the board for the Greater Boston chapter.

Mark holds a B.S. from Bentley University and an A.S. from the University of Maine.