

Family Office Services and Administration For Your Life

Personal and Family Cash Management

Just as India Wharf's development enriched the lives of many of Boston's families 200 years ago, India Wharf Family Office Services, LLC, enhances the lives of Boston's affluent families today through a unique blend of administration and organizational financial services. Founder Lee C. Costello, Certified Treasury Professional and Cash Manager, brings her skills and experience to manage a family's cash flows and coordinate its total financial situation. Her many years' experience as a licensed investment professional and client manager at Boston's most prestigious financial institutions taught her that successful business relationships are both consultative and customized.

A Proud History of Wealth and Prosperity

Led by Charles Bulfinch in 1807, India Wharf's revolution revitalized an aging city and infrastructure – ultimately bringing prosperity – and securing Boston's place on the world's map as a state-of-the-art, global trade hub.

Solutions Designed For Your Unique Needs

Organization

Administration

Cash Management

Bill Paying

Charitable Giving

Gifting

Insurance Reviews

Custom Reporting

Part of Your Team

As a trusted advisor, Lee Costello takes a strategic approach to help individuals and families navigate even the most complex financial situations and tasks. Her clients rely upon her to represent their interests according to their unique financial goals. She acts as a liaison with your investment, legal and accounting teams to achieve your short-term cash flow and long-term wealth objectives, while saving you precious time and money and affording the peace of mind you deserve.

Knowledge, Experience, Relationship Management

Lee's experience as a private banker and corporate cash manager working with family-owned and privately held businesses enables her to provide a unique approach to each client situation. More than 30 years in Boston's oldest and most respected financial institutions, including the Old Colony Trust Division of The First National Bank of Boston and State Street Bank and Trust Company, have instilled the value of trust, relationships and commendable service.

Let India Wharf Family Office Services, LLC, Work For You

After 200 years, India Wharf reminds us that wealth and prosperity are longstanding, if care is taken in their preservation. Lee Costello's affinity for relationships and cash management will work for you and your family through India Wharf Family Office Services, LLC.

