LWC Trustees

Gilbert M. Roddy, Jr., CFA
Before Gibbs Roddy joined the firm in 1985, he served as a Senior Financial Analyst for Amoco Corporation where he was involved in mergers and acquisitions. He holds an M.B.A. with high distinction from the Amos Tuck School of Business Administration, graduated *magna cum laude* from Bowdoin College with an honors degree in economics and graduated from the National Graduate Trust School with high honors. Gibbs is a Certified Trust and Financial Advisor and a CFA charterholder. Gibbs serves on the board of the Hollingsworth & Vose Company, is the Assistant Treasurer of the Boston Athenaeum, is a governor of the Concord Museum, and serves on the Advisory Board of the Concord Art Association.

William B. Perkins, CFA
Bill Perkins is the Compliance Partner for Loring, Wolcott & Coolidge Fiduciary Advisors, LLP. Prior to joining the firm in 1987, he was a practicing attorney and had served as a judicial law clerk. Bill is a graduate of Harvard College, Lewis & Clark Law School and the National Graduate Trust School. He is a member of the Boston Bar Association and the CFA Society of Boston.

Amy L. Domini, CFA
Amy Domini works with individuals to integrate social or ethical criteria into their investments. She is also Founder of Domini Impact Investments, LLC, a mutual fund family for socially responsible investors. She holds a B.A in International Economics from Boston University. Amy has been awarded an honorary Doctor of Business Administration from Northeastern University College of Law and an honorary doctorate from Yale University's Berkeley Divinity School. In 2008, Ms. Domini was named to Directorship magazine's Directorship 100, the magazine's listing of the most influential people on corporate governance and in the boardroom. In 2005, Time magazine named her to the Time 100 list of the world's most influential people. She has authored or co-authored several books, including Socially Responsible Investing: Making a Difference and Making Money (Dearborn Trade, 2001), Investing for Good (Harper Collins, 1993), The Social Investment Almanac (Henry Holt & Co., 1992), Challenges of Wealth (Dow Jones Irwin, 1988), Ethical Investing (Addison-Wesley, 1984). Amy is a past trustee of the Church Pension Board at the Episcopal Church (U.S.A.) and also a past Board member of the Governing board of the Interfaith Center on Corporate Responsibility, the National Community Capital Association, and the Social Investment Forum.

Hugh L. Warren, CFA
Hugh Warren became associated with the office in 1993, after nine years of acting as a trustee and financial advisor to individuals and families. He is a graduate of Harvard College, the Harvard Business School, and the National Trust School. He is a CFA charterholder and a member of the CFA Society of Boston. Hugh's prior business experience, including strategic planning at Temple, Barker & Sloane and marketing roles at Digital Equipment and IBM, enable him to evaluate investment opportunities from a fundamental business perspective. Also, Hugh has served as a director of a cyber-security firm in Waltham, Massachusetts and a director of a family owned company that has extensive timber holdings in Northern Maine. Hugh serves as the Treasurer of the American Friends for the Preservation of Czech Culture.

David Boit, CFA
David Boit, President of the Loring, Wolcott & Coolidge Office, joined the office as a trustee in 2001. He is a graduate of Harvard College and holds an MBA from the Wharton School of Finance. Additionally, David holds a Master's degree in International Studies from the University of Pennsylvania. Previously, he worked for Sextant Group Inc., a New York firm focused on venture capital and private equity investment opportunities. David also spent four years advising large corporations on mergers, acquisitions, and corporate transactions for James D. Wolfensohn Inc. and its Moscow-based affiliate The Russian-American Investment Bank. He is a member of the CFA Society of Boston and serves on the board of directors of the Pioneer Institute.

Thomas R. Appleton, CFA
Thomas Appleton serves as the Treasurer of the Loring Wolcott & Coolidge Office. He joined the Loring, Wolcott & Coolidge Office in 2006. Previously, he served as a Trust Officer at State Street Bank and United States Trust Company. He graduated from Trinity College with a degree in Economics and Asian Studies. He is a Certified Trust and Financial Advisor. In addition, he is a graduate of the National Graduate Trust School. Thomas is a member of the CFA Society of Boston, the Boston Estate Planning Council and serves as the Treasurer of the Colonial Society of Massachusetts.

Wendy S. Holding, CFA
Wendy Holding joined the firm in 2005 after six years at Wellington Management on the high yield bond team. Her career began in Bozeman, Montana, where she worked at Wild Forever, a grizzly bear conservation group. She decided to pursue a career in finance after witnessing the roles economics play in driving conservation policy. Wendy graduated cum laude from Princeton University. She is a CFA charterholder, a graduate of the National Trust School, and a member of the CFA Society of Boston. Wendy currently serves on the Advisory Board of the Carrot Project, the Massachusetts Advisory Board for the Trust for Public Land, the Board of the Siasconset Civic Association, and the Princeton University Rowing Association.

W. Andrew Mims
Andy Mims joined Loring, Wolcott & Coolidge as a trustee and partner in 2013. Prior to joining the firm, Andy created and ran the Sustainability Department of Gaylord Entertainment, a publicly traded hospitality and entertainment company based in Nashville, TN. Prior to Gaylord, Andy spent more than ten years in finance in New York, San Francisco and Boston, with the investment banks BT Wolfensohn (Deutsche Bank) and Thomas Weisel Partners, and the private equity firm ABS Ventures. Andy is a director of the Environmental League of Massachusetts, A Gathering of the Tribes, and The Food Project and is on the finance committee of Dedham Country Day School. He is a graduate of Princeton University and Dartmouth's Tuck School of Business.

Amory L. Logan, CFA

Amory L. Logan joined LWC in 2016, after five years serving on the investment team at the Dartmouth College Investment Office, which invests Dartmouth's endowment and other pools of capital. Previously, she worked at Cambridge Associates, a leading investment advisor, where she worked with clients including families, foundations, colleges and universities, on the implementation of their investment portfolios. Amory began her career at an education consulting firm, Carney, Sandoe & Associates, placing teachers in independent and charter schools across the U.S. She currently serves on the board of trustees for the Community Charter School of Cambridge, and the Neighborhood House of Northeast Harbor, ME. Amory is a graduate of Dartmouth College and Dartmouth's Tuck School of Business, and is a CFA charterholder.

Nushin Kormi, CFA

Nushin joined Loring, Wolcott & Coolidge in 2017. Prior to LWC, Nushin was a principal at the Rocky Mountain Institute ("RMI"). Before RMI, she was with the Environmental Markets Group at Goldman, Sachs & Co., Merrill Lynch, Rothschild, and the Boston Consulting Group. Nushin is the founder of Resility, a consultancy and research company focused on integrating environmental, social, and governance metrics into corporate analysis. Nushin is fluent in Farsi, and proficient in Swedish and French. She serves on the board of the James Blake Foundation and the Harvard Business School Club of Sweden. She holds an AB in Environmental Science and Public Policy from Harvard College and an MBA from Harvard Business School, and is a CFA charterholder.

David Cuetos, CFA

David Cuetos joined Loring, Wolcott & Coolidge in 2020. Prior to joining the firm, David worked for a decade as an investment professional in the technology sector. David was part of the public markets investment teams for Bain Capital, Ivory Capital and Citadel, and was part of the founding member team at Dendur Capital. David began his career as a consultant for McKinsey & Company in Spain. David earned a BS/MS in Electrical Engineering from the University of Oviedo, and his MBA from Harvard Business School, where he was a Baker Scholar and a Ramon Areces Scholar. He is also a CFA charterholder. David is fluent in Spanish and German.