

Our People | Loring, Wolcott & Coolidge



Peter B. Loring, CFA

Prior to joining the office in 1973, Peter Loring had six years of experience managing investment portfolios for a securities brokerage firm. He is a graduate of the Darden School of Business Administration at the University of Virginia and Boston University. He is a member of the Boston Security Analysts Society, and a member of the Boston Economics Club. Peter serves as a board member for the Bostonian Society (Boston's historical society), the Coal Energy Investments & Management, LLC, and the Essex County Greenbelt Association.



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 Tuck School of Business Administration, graduated Magna Cum Laude from Bowdoin College with a degree in economics and graduated from the National Graduate Trust School with high honors. Gibbs is a Certified Trust and Financial Advisor and holds the Chartered Financial Analyst designation. 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 Boston Security Analysts Society.



Amy L. Domini, CFA

Amy Domini works with individuals to integrate social or ethical criteria into their investments. She is also CEO and Founder of Domini Impact Investments, LLC, a no-load mutual fund family for socially responsible investors. She holds a B.A. in International Economics from Boston University. In 2006, Amy was awarded an honorary Doctor of Business Administration from Northeastern University College of Law. 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 member of the Boston Security Analysts Society and the Association for Investment Management and Research (AIMR). 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. Hugh serves as the Treasurer of the American Friends for the Preservation of Czech Culture and as a Director of Verdasy, a data service software company in Waltham, Massachusetts.



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 Boston Security Analysts Society 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 Boston Security Analysts Society, the CFA Institute and the Boston Estate Planning Council.



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, is a CFA charter holder and a graduate of the National Trust School. She is a member of the Boston Security Analysts Society, the Social Venture Network, and currently serves on the Board of the Princeton University Rowing Association and is the past Chair of the Board of the Jesse Smith Noyes Foundation.



W. Andrew Mims

Andy Mims joined Loring, Wolcott & Coolidge as a trustee and partner in 2013. Prior to joining the firm, Andy was Vice President of Sustainability for Gaylord Entertainment, a publicly traded hospitality and entertainment company based in Nashville, TN. As Gaylord's first sustainability officer, he created an award-winning program that focused on operational efficiency (energy, waste and water), capital investments and stakeholder engagement. 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, Manomet Center for Conservation Sciences and The Food Project. He is a graduate of Princeton University and Dartmouth's Tuck School of Business.



Amory Loring Logan

Amory Loring Logan joined LWC in 2016, after nearly 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. Amory is a graduate of Dartmouth College and

Dartmouth's Tuck School of Business.



Nushin Kormi

Nushin Kormi joined Loring, Wolcott & Coolidge (LWC) as a trustee and partner in 2017. She is a partner and founder of Resility, a sustainability consultancy and research company focused on integrating environmental, social, and governance metrics into corporate analysis. Prior to joining LWC, Nushin was a Principal at the Rocky Mountain Institute, a nonprofit focused on transforming global energy use, where she led the Institute's work on residential buildings. Nushin was a Vice President in the Environmental Markets Group at Goldman, Sachs & Co. in New York. She spearheaded the Environmental Markets Group's focus on water scarcity and worked across the organization to integrate sustainability. She began her career in Investment Banking and Private Equity at Merrill Lynch and Rothschild, and as a consultant at the Boston Consulting Group. Nushin serves on the board of the James Blake Foundation, benefiting Memorial Sloan Kettering Cancer Center, and the Harvard Business School Club of Sweden. She is a former term member of the Council on Foreign Relations and speaks Farsi fluently, as well as French and Swedish. Nushin earned her AB, *magna cum laude*, in Environmental Science and Public Policy from Harvard College, and her MBA from Harvard Business School.