



TONI PUOPOLO BROGNA

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BIOGRAPHY

Toni Puopolo Brogna, CTFA, CIS II

Director of Trust and Estate Services

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PRACTICE FOCUS

As the Director of Trust and Estate Services, Toni serves as a Trust Officer and oversees all aspects of trust, estate and tax services and administration. She has direct and frequent contact with clients and their family members, and she works closely with trustees. Toni also provides assistance with the management of clients' financial affairs and estate planning needs.

BIOGRAPHY

A long-time trust services professional, Toni Brogna joined the firm in March 2018 as the Director of Trust and Estate Services after serving as a Senior Trust Advisor at another prominent law firm located in Boston where she was responsible for all aspects of family office services for high net worth individuals. Toni has many years of experience collaborating with trustees, investment advisors, tax professionals, and estate professionals to implement complex estate and gifting plans, including charitable and personal gifting programs.

Toni is an active member of the Boston Estate Planning Council where she has served on the Women's Initiative Committee, the Annual Gala Committee, and the Membership Committee. Toni is also a member of the Estate & Business Planning Counsel of Worcester County and a member of the Institute of Certified Bankers.

Toni holds a Bachelor of Science degree in Business Management and Leadership from Northeastern University (*summa cum laude*), studied financial planning at Boston University, and is a graduate of Cannon Financial Institute Trust School. She has attained designation as a Certified Trust and Financial Advisor (CTFA) from the American Bankers Association and is a Certified IRA Specialist.

EDUCATION & CERTIFICATIONS

Certified IRA Specialist

Attained designation as Certified Trust and Financial Advisor (CTFA) from the American Bankers Association

Graduate of Cannon Financial Institute Trust School

Bachelors Degree, Business Management & Leadership; Northeastern University, *summa cum laude*

MEMBERSHIPS

Institute of Certified Bankers

Boston Estate Planning Council

Estate & Business Planning Counsel of Worcester County