

March 2026

**Boston Family Office, LLC
Part 2B of Form ADV
Brochure Supplement**

20 Custom House Street, Suite 700
Boston, MA 02110
(617) 624-0800
www.bosfam.com

This brochure supplement provides information about George P. Beal, Darren L Beals, Dylan C. Brix,, Michael J. Dorsey, Jr., Peder C. Johnson, George Putnam, III, Benjamin T. Richardson, Eliza H. S. “Happy” Rowe, Michael J. Unger, and Romahlo I. Wilson. This is a supplement to the Boston Family Office Form ADV, Part 2A (also known as our Brochure). You should have received a copy of the Brochure. Please contact the Boston Family Office if you have not received the Boston Family Office’s Brochure or if you have any questions about the contents of the supplement.

Additional information about the individuals listed above is available on the Security and Exchange Commission’s website at www.adviserinfo.sec.gov.

George P. Beal

Educational Background and Business Experience

Mr. Beal was born in 1953.

Educational Background

University of Pennsylvania Philadelphia, PA	Graduated 1975 BA – American Civilization
--	--

Business Background

Boston Family Office Boston, MA	1996 to present Portfolio Manager, Partner
Breckinridge Capital Advisors Boston, MA	2011 to present Board of Directors
Northeast Investors Trust Boston, MA	2005 to 2023 Trustee
Cambridge Trust Company Cambridge, MA	1990-1996 Vice President, Lending
Bank of New England Boston, MA	1979-1990 Assistant Vice President, Commercial Lending

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Beal.

Other Business Activities

Mr. Beal sits on the Board of Directors of Breckinridge Capital Advisors, a manager of fixed income and income-oriented portfolios. As a volunteer, Mr. Beal serves as Treasurer of Homeowners Rehab, Inc., a developer of affordable housing in Cambridge, MA; he is also a member of the Cambridge Community Foundation's investment committee, and the Council for the Arts at MIT. Mr. Beal is a graduate of the National Trust School.

Additional Compensation

Mr. Beal receives compensation for his duties as a director of Breckinridge Capital Advisors. He is trustee of several trusts and in some cases receives compensation for those duties. Other than that, he does not receive economic benefits from any person or

entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Beal's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to Benjamin Richardson, Chief Investment Officer. Mr. Richardson can be reached at (617) 624-0800.

Darren L. Beals

Educational Background and Business Experience

Mr. Beals was born in 1972.

Educational Background

Babson College Wellesley, MA	Graduated 2005 Master of Business Administration
Northeastern University Boston, MA	Graduated 1999 BS in Business Administration, Finance
University of New Hampshire Durham, NH	Graduated 1994 BS in Education

Business Background

Boston Family Office Boston, MA	2021 – present Chief Compliance Officer, COO
New Generation Advisors Manchester, MA	2008 – 2021 CFO, CRO, and Member of the Firm
JP Morgan Chase & Company Boston, MA	2007 – 2008 VP - Senior Financial Reporting Manager
MFS Investment Management Boston, MA	2000 – 2007 AVP – Financial Reporting and Fund Admin

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Beals.

Other Business Activities

Mr. Beals is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Beals is a trustee of a trust and receives compensation for those duties.

Supervision

Mr. Beals does not manage client portfolios or relationships. He is responsible for compliance and other operational areas, working with all members of the firm. Concerns can be raised to George P. Beal. Mr. Beal is the Managing Partner and can be reached at (617) 624-0800.

Dylan C. Brix, CFA, CTFA

Educational Background and Business Experience

Mr. Brix was born in 1985.

Educational Background

Bowdoin College Brunswick, ME	Graduated 2007 BA – English, Government & Legal Studies
----------------------------------	--

Chartered Financial Analyst #6283126
Certified Trust and Fiduciary Advisor #ABAPC94650
(please see the note at the end of this brochure regarding these designations)

Business Background

Boston Family Office Boston, MA	2020 to present Portfolio Manager, Partner
Reynders, McVeigh Capital Management Boston, MA	2017 to 2020 Portfolio Manager
Athenahealth, Inc. Watertown, MA	2016 to 2017 Manager
Loring, Wolcott & Coolidge Trust Boston, MA	2014 to 2016 Equity Analyst

Algonquin Advisors
Greenwich, CT

2007 to 2014
Vice President

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Brix.

Other Business Activities

Mr. Brix is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Brix does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Brix's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Michael J. Dorsey, Jr., CFA

Educational Background and Business Experience

Mr. Dorsey was born in 1985.

Educational Background

Wesleyan University
Middletown, CT

Graduated 2008
BA – American Studies

Boston University
Boston, MA

Graduated 2013
MS – Investment Management

Chartered Financial Analyst #182899
(please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2020 to present Portfolio Manager, Partner
Steward Partners Global Advisory Boston, MA	2017 to 2020 Wealth Manager
Boston Advisors Boston, MA	2011 to 2017 Portfolio Manager & Equity Analyst
Brown Brothers Harriman Boston, MA	2008 to 2011 Operations Analyst

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Dorsey.

Other Business Activities

Mr. Dorsey is not involved in any investment-related business apart from the Boston Family Office. He is a board member for the Mal's Pals Foundation.

Additional Compensation

Mr. Dorsey does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Dorsey's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Peder C. Johnson, CFA

Educational Background and Business Experience

Mr. Johnson was born in 1970.

Educational Background

Thomas Edison State College Trenton, NJ	Graduated 2003 BS – Business Administration
Boston University Boston, MA	Graduated 2005 MS – Investment Management

Chartered Financial Analyst #111742
(please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2016 to present Portfolio Manager, Partner
Roxiticus Partners, LLC Charlestown, MA	2010 – 2015 Portfolio Manager, Managing Director
Parkman Shaw & Company, Inc Brookline, MA	2004 – 2010 Portfolio Manager, Analyst

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Johnson.

Other Business Activities

Mr. Johnson is not involved in any investment-related business apart from the Boston Family Office. He volunteers time to several non-profits including: The Shaw Fund for Mariners' Children, the Strong-Cuevas Sculpture Foundation, the North Bennet Street School, and the Charlestown Youth Hockey Association.

Additional Compensation

Mr. Johnson serves as trustee for several trusts and is compensated for those duties. Other than that, he does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Johnson's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin

Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

George Putnam, III
New Generation Advisors
13 Elm Street, Suite 2
Manchester, MA 01944

Educational Background and Business Experience

Mr. Putnam was born in 1951.

Educational Background

Harvard College Cambridge, MA	Graduated 1973 BA
Harvard Business School Harvard Law School Cambridge, MA	Graduated 1978 Joint JD and MBA

Business Background

New Generation Advisors Manchester, MA	1988 to present President
New Generation Research Boston, MA	1986 to present Chairman
Putnam Group of Mutual Funds Boston, MA	1984 to present Trustee
Boston Family Office Boston, MA	1996 to present Partner, Outside Director

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Putnam.

Other Business Activities

Mr. Putnam is not involved in the daily operations of the Boston Family Office. He is the President of New Generation Advisors, which formerly managed funds investing in distressed securities, and Chairman of New Generation Research, Inc., which publishes bankruptcy and turnaround data. Mr. Putnam also serves as Trustee of the Putnam Group

of Mutual Funds. He is a director of the Gloucester Marine Genomics Institute in Gloucester, MA. He also sits on the investment committees of several other nonprofit organizations.

Additional Compensation

Mr. Putnam's primary compensation comes from sources other than the Boston Family Office. Some clients of the Boston Family Office invest in mutual funds managed by the Putnam Group of Mutual Funds. There are fees related to these investments, over and above the fees charged by the Boston Family Office. Mr. Putnam is not compensated for business referred to these entities, nor do those entities compensate any BFO personnel for referrals.

Supervision

Mr. Putnam is an outside director and not involved in the daily operations of the Boston Family Office.

Benjamin T. Richardson, CFA

Educational Background and Business Experience

Mr. Richardson was born in 1975.

Educational Background

Connecticut College New London, CT	1993-1995
---------------------------------------	-----------

Harvard College Cambridge, MA	Graduated 1997 BA – Economics
----------------------------------	----------------------------------

Chartered Financial Analyst #411089
(please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2004 – present Portfolio Manager, Partner
------------------------------------	--

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Richardson.

Other Business Activities

Mr. Richardson is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Richardson is a trustee of several trusts and in some cases receives compensation for those duties. Other than that, he does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Richardson's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal, as Mr. Richardson serves as the Chief Investment Officer. Mr. Beal is the Managing Partner and can be reached at (617) 624-0800.

Eliza H. S. "Happy" Rowe

Educational Background and Business Experience

Ms. Rowe was born in 1969.

Educational Background

Denison University Granville, OH	Graduated 1991 BA – History
-------------------------------------	--------------------------------

Business Background

Boston Family Office Boston, MA	2000 to present Portfolio Manager, Partner
Tucker Anthony, Inc. / Freedom Capital Mgmt. Boston, MA	1991 – 2000 Investment Executive, Portfolio Asst., Sales Asst.

Disciplinary Information

There have been no legal or disciplinary actions against Ms. Rowe.

Other Business Activities

Ms. Rowe serves as the Treasurer of the Prout's Neck Sanctuary, which is a non-profit entity within the Prout's Neck Association, and a Trustee of the Amelia Peabody Charitable Fund.

Additional Compensation

Ms. Rowe is a trustee of several trusts and in some cases receives compensation for those duties. In addition, she is a compensated Trustee of the Amelia Peabody Charitable Fund. Other than that, she does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Ms. Rowe's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Michael J. Unger, CFA
2776 Odell Drive
Erie, CO 80516

Educational Background and Business Experience

Mr. Unger was born in 1965.

Educational Background

University of Dayton Dayton, OH	Graduated 1990 BA – Finance
------------------------------------	--------------------------------

Chartered Financial Analyst #222343
(please see the note at the end of this brochure regarding the CFA designation)

Business Background

Boston Family Office Boston, MA	2000 to present Portfolio Manager, Partner
Mellon Private Asset Management Boston, MA	1997 – 1999 Senior Portfolio Manager

Key Bank
Dayton, OH

1992 – 1997
Portfolio Manager, Trader

Society Bank
Dayton, OH

1991 – 1992
Credit Analyst

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Unger.

Other Business Activities

Mr. Unger is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Unger is a trustee on several trusts and in some cases receives compensation for those duties. Other than that, he does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Unger's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Romahlo I. Wilson
206 Cory Street
Boston, MA 02132

Educational Background and Business Experience

Mr. Wilson was born in 1979.

Educational Background

Stanford University
Stanford, CA

Graduated 2001
BA – IDM (Computer Science, Mechanical Engineering & Art)

The Wharton School of the University of Pennsylvania Philadelphia, PA	Graduated 2006 MBA – Finance & Public Policy
---	---

Business Background

Boston Family Office Boston, MA	2025 to present Portfolio Manager
ACM Capital Management Boston, MA	2015 to 2025 Founder & Portfolio Manager
Parnassus Investments San Francisco, CA	2011 to 2015 Portfolio Manager & Senior Research Analyst
Cleantech Approach New York, NY	2009 to 2011 Partner
Houlihan Lokey New York, NY	2007 to 2009 Senior Associate

Disciplinary Information

There have been no legal or disciplinary actions against Mr. Wilson.

Other Business Activities

Mr. Wilson is not involved in any investment-related business apart from the Boston Family Office.

Additional Compensation

Mr. Wilson does not receive economic benefits from any person or entity other than the Boston Family Office in connection with providing investment advice to clients.

Supervision

Each portfolio manager at the Boston Family Office operates independently. All of Mr. Wilson's accounts, and all investment management accounts of the Boston Family Office for that matter, are reviewed by the Investment Committee at least twice a year. The supervision is informal, but concerns can be raised to George P. Beal or Benjamin Richardson. Mr. Beal is the Managing Partner and Mr. Richardson is the Chief Investment Officer. They can be reached at (617) 624-0800.

Notes on Professional Designation

*** Chartered Financial Analyst designation:**

To earn a CFA charter, you must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. Completing the Program takes most candidates between two and five years.

*** Certified Trust and Fiduciary Advisor designation:**

The Certified Trust and Fiduciary Advisor (CTFA) is a professional designation from the American Bankers Association (ABA) for wealth management experts in trusts, estates, and financial planning, requiring experience, education, and passing a comprehensive exam on fiduciary duties, investments, taxes, and ethics; it's maintained through ongoing education and adherence to an ethical code. To earn it, candidates need relevant experience (e.g., 3+ years in wealth management with training, or a degree with more experience) and must pass a 200-question exam, with renewal needed every three years.