



ArchBridge Family Office Promotions

ArchBridge Family Office is pleased to announce the promotion of three team members in recognition of their continued contributions to the firm and the families it serves. Klaire Whiteside and Jeff Meyers, Jr. have been promoted to Principal, and Logan Carolan has been promoted to Manager.

Klaire Whiteside | Klaire works closely with multi-generational families, providing integrated guidance across investments, tax, estate, governance, risk, and [philanthropy](#). Her thoughtful, analytical approach helps clients navigate complexity with clarity. She is known for building trusted relationships and serving as a steady advocate for the families she supports.

Jeff Meyers, Jr. | Jeff is Senior Director of Private Markets and leads the firm's investment team, partnering with clients and advisory teams to develop and implement customized portfolios across public and private markets. He plays a central role in manager selection and private investment sourcing, including private equity, venture capital and real assets, and provides ongoing oversight and research to support long-term client strategies.

Logan Carolan | Logan is a key member of the firm's operations team, helping advance its technology and infrastructure. He has led major platform implementations and workflow enhancements and has been and continues to be instrumental in deploying AI-driven tools that improve efficiency and elevate the client experience.

"These promotions reflect Klaire, Jeff, and Logan's meaningful contributions to our clients and our firm," said Julie Lilly, CEO. "Each brings a high level of expertise, judgment, and care to the families we serve."

ArchBridge Family Office congratulates Klaire, Jeff, and Logan on their well-earned promotions and looks forward to their continued contributions in the years ahead.

ArchBridge Family Office is an independent, multi-family office and trust company that advises 65 clients on more than \$13 billion of investment assets and more than \$16 billion of total wealth. Founded in 2002, ArchBridge Family Office provides holistic, high-touch client service including customized, independent investment management and a full range of family office and fiduciary services. The firm serves a limited number of clients with substantial wealth in order to maintain very low client-to-employee ratios. Visit archbridge.com to explore how the firm manages complexity with unmatched expertise and a Family, Forward focus.