www.northeastinvest.com

Northeast Investment Management, Inc.

Financial Planning

Team

Jenna L. Bertelmann

Daniel Costa, CFP®, EA

John F. Francini, CFA

Christopher Harris, CFP®, EA

Robert M. Kane, CFP®, CTFA

John R. Lawrie, Jr., CFA, CTFA

Nancy M. Mulligan, CFP®, CTFA

James W. Murphy, J.D., CFP®, AEP®

Justin E. Oates, MBA, CFP®

Overview

A cohesive financial plan incorporates goals, ideas and data from all aspects of a family's financial life.

Our investment advisors, all of whom hold advanced financial designations such as CERTIFIED FINANCIAL PLANNER™, Chartered Financial Analyst, Certified Trust and Fiduciary Advisor, Certified IRA Services Professional, Accredited Estate Planner and Enrolled Agent, assure that financial decisions are based on a complete view of financial resources, spending levels and family priorities.

We help clients with:

- Budgeting
- Education planning
  - 529 accounts
  - Custodial accounts
  - Minor trusts
- Retirement planning
  - IRA, SEP and other retirement account management
  - Maximizing tax-deferred account contributions
  - Social Security and pension considerations
  - Retirement cash flow planning
- Charitable giving
  - Tax-aware gifts of cash, securities or other assets
  - Gift fund accounts
  - Gifts from IRAs
  - Charitable trusts and family foundations

 | T 617.523.3588 | 617.523.5412