



Bernadette A. Ward

CLIENT RELATIONSHIP MANAGER

Phone: 617.778.5416 | Email: bward@northeastinvest.com

Services

Family Office Services

Overview

Bernie is a Client Relationship Manager. In this role, she is responsible for the administration of client accounts to ensure client communications are timely met.

She provides support to Investment Advisors, Trustees, tax preparers and clients of the office maintaining an excellent service level.

Bernie has over 30 years of experience serving clients in the wealth management industry. Prior to joining the firm, she was a Client Service Officer at Brown Brothers Harriman & Co. for 15 years. In addition, she was an Account Administrator for 10 years at Bank of America.

Bernie lives in Boston, Massachusetts and has been with Northeast since 2015.