Northeast
Investment Management, Inc.

www.northeastinvest.com



Daniel Costa, CFP®, EA

VICE PRESIDENT, TAX MANAGER

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Services

- Fiduciary Services and Estate Planning
- Financial Planning
- Investment Management
- Tax Consultation and Preparation

Overview

Dan is a Tax Manager and serves as the Chair of the firm's Tax Department. In this role, he provides individual and fiduciary tax services as well as tax planning for clients. In addition, Dan also serves as a Trustee and Investment Advisor on various trusts and client accounts.

Prior to joining the firm, he worked as a tax advisor at Rice, Heard & Bigelow, Inc., a private trust company. Before this, he was an income tax specialist at State Street Bank and Trust Company.

Dan lives in Stoneham, Massachusetts with his family and has been with Northeast since 2003.

Education & Certification

Northeastern University, B.S. – 1991

CERTIFIED FINANCIAL PLANNER™

Enrolled Agent

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