Northeast
Investment Management, Inc.

www.northeastinvest.com



Garrett J. Leahy

PORTFOLIO ASSISTANT & TRADER

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Services

Investment Management

Overview

Garrett is a Portfolio Assistant servicing clients by providing direct support to the Portfolio Managers. He prepares reports and provides analysis for client meetings and requests. He administers, monitors and troubleshoots accounts on a regular basis and assists in reviewing investments and rebalancing portfolios alongside the Portfolio Manager. As a member of the firm's Investment Committee, he is responsible for research and analysis of various market sectors and investments.

In addition, he serves as the head trader for the firm where he manages all client orders from completion to settlement, while monitoring the process to ensure best execution.

Before joining the firm, he worked for BNY Mellon Wealth Management. Working directly with a team of wealth managers as a portfolio analyst, he assisted in providing advice and planning to high-net-worth clients. He is currently studying to become a CERTIFIED FINANCIAL PLANNER™.

Garrett lives in Boston and has been with Northeast since 2021.

Education

College of the Holy Cross, B.A. – 2019

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