



Garrett J. Leahy

PORTRFOLIO ASSISTANT

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Services

Family Office 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. Garrett is a Level I candidate in the CFA Program.

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.

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

Education

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