Northeast
Investment Management, Inc.

www.northeastinvest.com

James W. Murphy, J.D., CFP®, AEP®

VICE PRESIDENT, CHIEF FIDUCIARY OFFICER

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Services

Family Office Services

Fiduciary Services and Estate Planning

Financial Planning

Investment Management

Overview

James is the firm's Chief Fiduciary Officer. In this role, James has oversight and implementation responsibility for all aspects of trust administration and estate settlement at Northeast.

This includes governance over fiduciary acceptance, review of account and estate opening procedures, ongoing fiduciary account oversight, and strict adherence to the terms of governing instruments. In addition, James works closely with the firm's portfolio managers and clients to analyze estate plans, direct post-mortem workflows, and ensure precise execution of dispositive intentions.

James has over 19 years of wealth management experience, including serving as the Regional Fiduciary Wealth Manager in BNY Mellon Wealth Management's Boston Office. Prior to BNY Mellon, James was a Trust Administrator at Choate, Hall & Stewart LLP and an associate at the Boston law firm of Pabian & Russell, LLC, where he worked closely with clients on their estate planning and estate administration needs.

James lives in Beverly, Massachusetts with his family and has been with Northeast since 2019. He is a member of the Boston Estate Planning Council, the Essex County Estate Planning Council, and the Financial Planning Association of Massachusetts.

Education & Certifications

Suffolk University Law School, J.D. – 2006
Boston College, B.A. – 2002

CERTIFIED FINANCIAL PLANNER™
Accredited Estate Planner®