Northeast
Investment Management, Inc.

www.northeastinvest.com



Jenna L. Bertelmann

SENIOR RELATIONSHIP MANAGER, ASSISTANT VICE PRESIDENT

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Services

Fiduciary Services and Estate Planning

Financial Planning

Investment Management

Overview

Jenna is a Senior Financial Planning Associate supporting portfolio managers in the design, implementation and administration of comprehensive financial and investment plans.

She also assists with trust administration and estate settlement for the firm's clients. In this role, she reviews current estate planning structures and assists in the probate administration process. In addition, she contributes to firm-wide projects that improve overall client needs and firm efficiency. Jenna is pursuing the Certified Trust and Fiduciary Advisor (CTFA) designation.

Jenna has over a dozen years of wealth management experience, including serving as a Client Relationship Manager where she developed relationships with clients, handling their day-to-day interactions.

Jenna lives south of Boston with her husband and two children and has been with Northeast since 2007. She is currently studying to become a CERTIFIED FINANCIAL PLANNER™.

Education & Certification

University of New Hampshire, B.A. – 2007

Boston University Center for Professional Education, Certificate in Financial Planning – 2013

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