www.northeastinvest.com

John R. Lawrie, Jr., CFA, CTFA

MANAGING DIRECTOR

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Services

- Financial Planning
- Family Office Services
- Fiduciary Services and Estate Planning
- Investment Management

Overview

John is a shareholder and Managing Director of the firm. John serves as a Portfolio Manager and Investment Advisor for individual and family relationships.

Complimenting this role, John is a member of the firm's Investment Committee, where he analyzes macroeconomic trends and sector-specific factors in order to provide guidance to the firm's other portfolio managers and their clients. Given his background, John will often serve as a trustee for many of his clients, ensuring a prudent administration of a family's wealth and its transfer to future generations.

John has over a dozen years of professional wealth management experience serving the clients of Northeast. Prior to his current role, he served as a Research Analyst, head trader and Client Relationship Manager.

John lives in Walpole, Massachusetts with his family and has been with Northeast since 2007. He is a member of the CFA Institute and the Boston Security Analyst Society.

Education & Certifications

Bowdoin College, A.B. – 2007

Chartered Financial Analyst®
Certified Trust and Fiduciary Advisor