Northeast
Investment Management, Inc.

www.northeastinvest.com



Justin E. Oates, MBA, CFP®

MANAGING DIRECTOR

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Services

Fiduciary Services and Estate Planning

Financial Planning

Investment Management

Overview

Justin is a Portfolio Manager and Investment Advisor, as well as a shareholder and Managing Director of the firm. He is responsible for working closely with other firm leadership to oversee the strategic plan for the firm and all aspects of investment management and client relations.

Justin helps high net worth clients define their investment goals and implement strategies to meet them. He serves as trustee on many relationships, providing professional guidance to clients and their families.

Justin has over 16 years of varied wealth management and financial services experience, including serving as Assistant Vice President at the Brown Brothers Harriman & Co. Boston office, in their Private Banking and Wealth Management Division.

Justin lives in Brookline, Massachusetts, with his family and has been with Northeast since 2011.

Education & Certification

F.W. Olin Graduate School of Business at Babson College, M.B.A. – 2007
Cornell University, B.A. – 2002

CERTIFIED FINANCIAL PLANNER™

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