



Kelly A. Beatty

DATA ANALYST

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Overview

Kelly is a Data Analyst at the firm. In this role, she is responsible for client onboarding and accurate recordkeeping across multiple platforms.

Kelly provides support to Investment Managers, Client Relationship Managers and tax preparers. She also manages the firm's fee billing system and performs 13F regulatory reporting.

Prior to her current role, she served as a Client Relationship Manager.

Kelly lives in Weymouth, Massachusetts with her family and has been with Northeast since 1987.