Northeast
Investment Management, Inc.

www.northeastinvest.com

Nancy M. Mulligan, CFP®, CTFA

PRESIDENT, MANAGING DIRECTOR

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Services

Fiduciary Services and Estate Planning

Financial Planning

Investment Management

Overview

Nancy is a shareholder and Managing Director of the firm. Nancy serves as a Portfolio Manager and Trustee, managing assets for individuals, families and endowments.

Taking a holistic approach to wealth management, she helps individuals and families define their financial and investment goals and implement strategies to meet these goals, often in collaboration with their attorneys, accountants or other trusted advisors.

Nancy has over 20 years of wealth management experience. Prior to joining the firm, she worked at Wellington Management Company and began her business career with Chase Private Banking.

Nancy lives in Boston with her family and has been with Northeast since 1999.

Education & Certifications

Boston College, M.A.
Fairfield University, B.A.

CERTIFIED FINANCIAL PLANNER™
Certified Trust and Fiduciary Advisor

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