Northeast
Investment Management, Inc.

www.northeastinvest.com



Peggy G. Chen

SENIOR BUSINESS ANALYST

Phone: 617.778.5419 | Email: pchen@northeastinvest.com

Overview

Peggy is a Senior Business Analyst at the firm. In this role, she is responsible for providing analytical assessments of business issues in an effort to drive corporate efficiency, profitability and growth.

Peggy oversees highly complex projects and manages all phases including research & analysis, project management, presentation and implementation. She also provides governance, establishes and implements best practices and monitors the firm's efficient use of its central portfolio accounting, trading and report management platforms. Peggy is pursuing the Certified Trust and Fiduciary Advisor (CTFA) designation.

Peggy has over a decade of consulting experience, primarily focused on software implementation. Prior to joining Northeast, Peggy was a senior consultant at SS&C Advent. She has advised large public entities as well private financial services firms ranging from start-ups to organizations with billions of dollars under management.

Peggy lives in Boston with her family and has been with Northeast since 2019. In her free time, Peggy enjoys hiking, traveling and foraging for wild mushrooms.

Education

Wellesley College, B.A. – 2006

©2024 Northeast Investment Management, Inc. All Rights Reserved | T 617.523.3588 | 617.523.5412