Cottage Street | Advisors
Fee-only, Investment Management

Independent | Fiduciary| Personalized

Introduction to Our Firm

Cottage Street Advisors, LLC

Cottage Street Advisors is an SEC registered **fee-only investment advisory firm** focusing on the specific needs and requirements of high net worth clients and families. To provide the personalized service that our clients have always received, we are careful about managing the growth of our practice. We presently are working with approximately fifty clients and families for whom we manage over one hundred discreet portfolios. We manage portfolios of all sizes, but our larger clients have assets of $25 million to $40 million under management.

Services

Our firm provides two primary services for our clients: **individualized portfolio management** and **financial strategy and planning advice.**

As a fee-only firm, we sell no products and accept no payment for services from anyone other than our clients. All client assets are managed in individual client accounts.

Investment Philosophy

Broadly speaking, **we are long-term, patient, value investors**, always sensitive to our obligation to balance preserving our clients' wealth as well as seeking long-term appreciation. Generally in our client portfolios, we broadly diversify our holdings in individual securities and bonds, exchange traded funds, and alternative investments. When appropriate, we employ hedging strategies to reduce volatility and mitigate potential losses.

Your Team

Michael K. Davis

Michael K. Davis is the founder and **Managing Partner** of Cottage Street Advisors, with thirty-five years of professional investment management experience. He is a graduate of Yale University (BA) and the Harvard Graduate School of Business (MBA, with distinction), and received his certification as a CPA after graduation from Harvard. Mike served as a commissioned officer in the US Army between his undergraduate and graduate school years. Mike's social interests include travel, sailing and tennis, and he is an avid duplicate bridge player. Mike lives with his wife Irene in Marion and in Palm Beach, Florida.

Jason Haviland, CFA, CEBS, PMP

Jason Haviland is a **Senior Partner** at Cottage Street Advisors. Prior to joining Cottage Street, Jason founded J. Bradford Investment Management, an independent RIA and was a vice president with Fidelity Investments. Jason holds a BA in Economics from the University of Michigan and an MBA from Boston College. In addition, he has earned three distinguished professional credentials: Chartered Financial Analyst (CFA), Certified Employee Benefits Specialist (CEBS) and Project Management Professional (PMP).

Jason lives in Nashua with his wife and two daughters.

Helen Correale

Helen Correale is our indispensable **Office Manager** and goto problem solver. She has been with Mike Davis and Cottage Street Advisors for almost 15 years. Helen has an Associates Degree in Business Administration from Merrimack College. She is a 15-year resident of West Wareham, where she lives with her son and husband of 26 years.

Interesting and Informational

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Not a millionaire, yet!

Many of our clients are high net worth individuals and families with substantial investment portfolios, but in many cases those assets started modestly and grew over many years. We recognize the needs of **professionals just getting started** or those with a more immediate need for specific financial advice.
We invite everyone to learn more with a **complimentary consultation**.

LEARN MORE

Cottage Street Advisors welcomes all visitors and clients from J. Bradford Investment Management.

OUR STORY

GET DIRECTIONS

Contact Us

Phone

(508) 748-0709
(603) 438-1874

9 Cottage Street, PO BOX 249, Marion, Massachusetts 02738, United States

1 Tara Blvd, Suite #200, Nashua, New Hampshire 03062

We are also available throughout Greater Boston via the Workbar Network.

We travel frequently. Please schedule an appointment to meet with us in person.

Hours

Open today 09:00 am – 05:00 pm

SEND A MESSAGE

Cottage Street Advisors, LLC provides investment management and financial planning services to families and individuals throughout Greater Boston, New England and across the country. Our investment management services are primarily provided out of our Marion, MA office and our financial planning services are primarily provided out of our Nashua, NH office, though we will do our best to provide either investment management or financial planning services to you in a way that best suits your preferences and location. From Plymouth County to the Lakes Region in New Hampshire we'll work to find the best advisor interaction model for you!

Cottage Street Advisors, LLC is a veteran owned business

(508) 748-0709