

Our relationships are founded on trust, sound financial advice, and effective client communications.

For more than 60 years, Northeast Investment Management, Inc. and its predecessors have been independent wealth managers whose focus has been managing the financial affairs of our clients with dedication and personalized service. This focus has not changed.

Members of our team have been with us, on average, for more than 15 years. Our clients value this familiarity and continuity.

Our clients include individuals, multi-generational families, trusts, foundations and charitable entities. Many of the clients we work with today are the children and grandchildren of clients we began working with decades ago.

Northeast is wholly owned by its partners, all of whom are actively engaged in serving our clients. We are a registered investment adviser with more than \$1.4 billion in assets under management.