Independent Financial Advice Since 1974

Lowell, Blake & Associates is an investment advisory firm providing personalized financial services for individuals, families, nonprofits, foundations, endowments and businesses. Founded on the principle of a team approach rooted in integrity and trust, our clients have experienced tailored solutions from us for over forty years.

A CLIENT-FIRST APPROACH

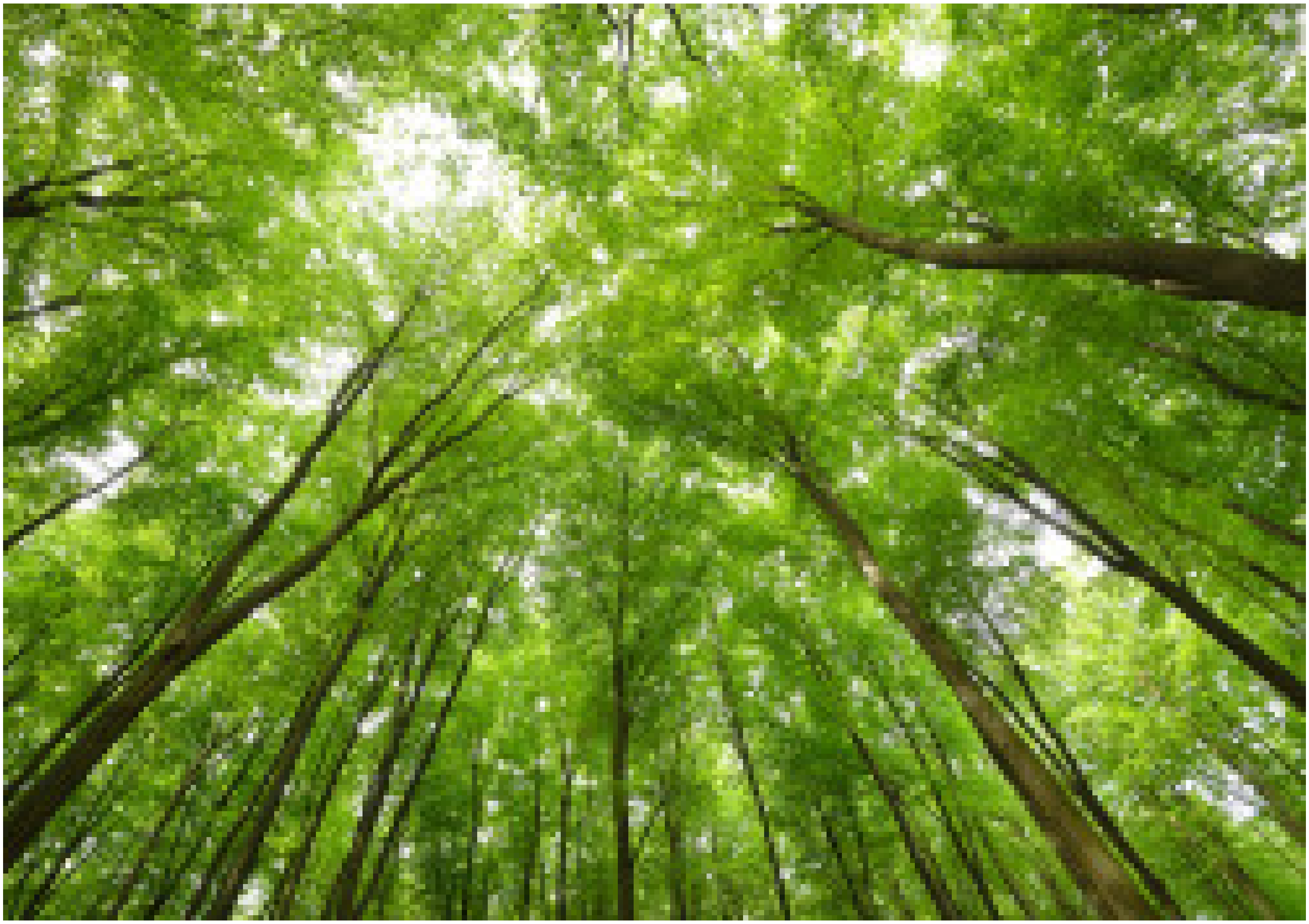
Clients benefit from the science of our deep market expertise and concentration on long-term value. Complimented by the art of our team's independent analysis, curious nature, and inspired thinking, this distinct method allows LBA to keep our clients, and their financial goals, at the core of our focused approach. Learn more about our:

Investment Philosophy & Principles

We don’t just make investment recommendations; we help clients build a truer understanding of their financial lives. **We focus on your financial health**.

Independent & Unbiased Advice

Because LBA is an independent, employee-owned firm, we answer only to our clients—with no bias from corporate quotas or incentive schemes. **Clients come first**.



High Ethical Standards

LBA takes social responsibility personally. Our high ethical standards apply both to our work with clients and to our investment decisions. **Responsible can be profitable**.

PERSONALIZED SERVICES

We offer personalized recommendations designed to help clients meet their financial and life goals. Whether you want a plan for general long-term growth or a strategy to meet specific aims such as college or retirement planning, we are here to deliver for you:

Fiduciary Services

As a result of our focus on relationships, transparency, and fiduciary trust, clients often ask us to serve as trustees, thereby providing integral support in planning for their family's future. **Why clients trust us with their funds**.

Financial Life Planning

Our goal is to empower clients with guidance on the entirety of their financial lives, including budgeting, estate planning, tax considerations, and other life circumstances. **Planning for long-term success**.

Customized Investment Solutions

We don't just look at last quarter's earnings; we study indicators of long-term industry and company health to find investment opportunities that meet clients' financial goals, while also reflecting their values. **Smart portfolio management**.

RESEARCH & ANALYSIS

We believe in long-term investing, which means understanding the social, demographic, and economic shifts that affect markets. Our insight into emerging and ongoing market trends, our analysis of how these trends will play out in key industries, and our in-depth company research are all part of our process for identifying promising investments. Read about our:

Latest LBA news

Our newsletter provides investors with unbiased market analysis, performance overviews, and hands-on guidance. **Read the latest LBA news**.

Market Insight & Analysis

These in-depth thought pieces offer unique insight into the market, with our take on important trends, indicators, and opportunities. **Get insight & analysis**.

Research Reports

LBA’s research reports gauge prospects for companies in key industry sectors, with our trademark focus on sustainable growth. **See sample reports**.

THE SPIRIT OF LBA

Our team is comprised of dedicated professionals bringing expertise, diverse perspectives, and unmatched commitment for our clients and their goals. We take a fervent approach to our knowledge of investments to match our convictions with our client’s individual values. And our team-based approach brings a shared passion and focus, personalized attention, and a creative approach to everything we do. Meet our team:

James B. Balfour, CFA

PORTFOLIO MANAGER & RESEARCH ANALYST

Read more (../jim-balfour)

J. Timothy Delaney

MANAGING DIRECTOR OF INVESTMENT STRATEGY & PRINCIPAL

Read more (../j-timothy-delaney)

Nicole (Nikki) Gagliardi

MANAGING DIRECTOR OF OPERATIONS & PRINCIPAL

Read more (../nicole-gagliardi)

Karen Golding

CLIENT SERVICE ASSOCIATE & COMPLIANCE COORDINATOR

Read more (../karen-golding)

Mark R. MacCallum

PORTFOLIO MANAGER & PRINCIPAL

Read more (../mark-r-maccallum)

Diana B. Malcom

PRESIDENT & PRINCIPAL

Read more (../diana-b-malcom)

David H. Polansky, CFA

SENIOR RESEARCH ANALYST & PRINCIPAL

Read more (../david-h-polansky)

Erika Rhuda

SENIOR CLIENT SERVICE ASSOCIATE

Read more (../erika-rhuda)

Jessica C. Welch

ASSOCIATE PORTFOLIO MANAGER & GIVING COORDINATOR

Read more (../jessica-welch)

Cameron O'Leary

FINANCIAL OPERATIONS COORDINATOR

Read more (../cameron-oleary)

Francis P. Coolidge

RESEARCH CONSULTANT

Read more (../francis-p-coolidge)

James H. Lowell, II

FOUNDER

Read more (../james-h-lowell)

Susan Walsh Lowell

FOUNDER

Read more (../susan-walsh-lowell)

TALK TO ONE OF OUR ADVISORS

Learn more about how the LBA approach can help you meet your financial and life goals. We look forward to connecting with you via phone at 617-422-0064 or through the contact form below:

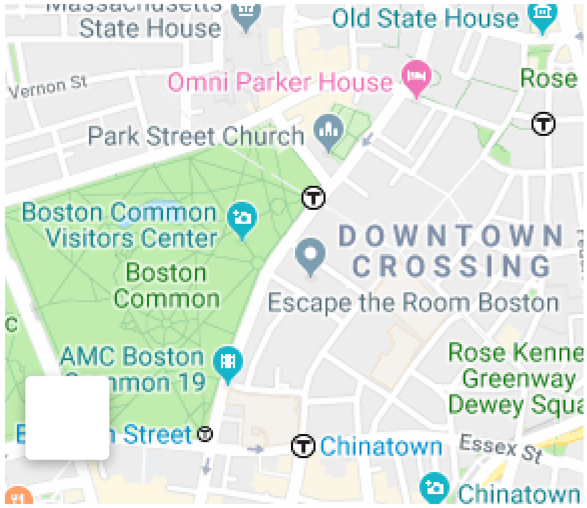
CONTACT US

Name:

Email:

Message:

SUBMIT



[Important Disclosures (http://lowell-blake.com/important-disclosures/)](http://lowell-blake.com/important-disclosures/)

Our offices, at the corner of Tremont Street and Temple Place, overlook the historic Boston Common and State House, with easy access from Park Street Station.

Lowell, Blake & Associates, Incorporated
141 Tremont Street, Suite 200
Boston, MA 02111
617-422-0064