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Client Focused

Personalized Planning

Experienced

Independent & Employee
Owned

Rigorous Investment Process

Tax Sensitive

BFM at a glance

Long term investments. Long term relationships.

Whether you are looking to grow your assets or preserve your lifestyle and legacy, active, conscientious management can provide peace of mind. Boston Financial Management's team collaborates with all of your advisers, asks the tough questions, and passionately pursues the right moves to help you achieve your goals.

Boston Financial Management





At Boston Financial Management, we have assembled a team of seasoned investment, financial planning, and fiduciary professionals who together develop strategies catered to each client's unique wealth management needs. Let us put our team to work for you.

Steve Kenney

President and CEO

BFM News

Boston Financial Management Expands to Portland

Boston Financial Management, LLC has expanded its reach by opening an office in Portland, Maine, in addition to its Boston, Mass location. Leading the Portland office is **Abby Psychogeos**, a **Wealth Manager and Managing Director** of the firm.

Psychogeos, a Yarmouth, ME resident, is joined by Maine Native, **Associate Wealth Manager, Katie Exchange**. As a team, and with the depth and expertise of their colleagues in Boston, Abby and Katie work with individuals and multi-generational families to help them achieve their investment and wealth management goals.

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Abby Psychogeos

Wealth Manager & Managing Director

Katie Exchange

Associate Wealth Manager

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