Northeast Planning Associates, Inc.

Robert Kratzer Everett, CRPC®, PPC™, AIF®

Financial Advisor

Account Access

in

(617) 733-8336

Financial Planning for All of Life's Seasons

No matter where you are in life, we can help you plan for tomorrow.

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Encompassing Your Financial Future

For more than 50 years, Northeast Planning Associates, Inc. has assisted clients with financial planning, and wealth and investment strategies. Working with individuals, families, and business owners, we provide our clients access to a full range of financial services and products.

My team and I understand the complexities of business and personal financial planning and our top priority is always to help enhance the lives and financial future of those with whom we work. We create a plan or strategy designed to address both short term and long term goals, and then adjust as necessary when life changes or market fluctuations require a direction change.

We believe in long-term relationships built around trust and honest, open communication. We are a resource for our clients and their families, whether recommending a financial path, or simply answering a pressing question or providing a referral to a local professional, such as a CPA or attorney.

No matter what season of life you find yourself in, we are here to help.

Free Portfolio Risk Analysis

Learn more about my practice and how we work with you.

Experience

Bob has more than 20 years of financial planning experience, working with clients locally in Cambridge, MA and throughout New England.

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How We Help

Building a financial plan or strategy is a process that begins with understanding your current situation and learning your plans and goals.

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Team

Bob's client service team has the knowledge and experience to help put together your financial plan or strategy and maintain it as life changes occur.

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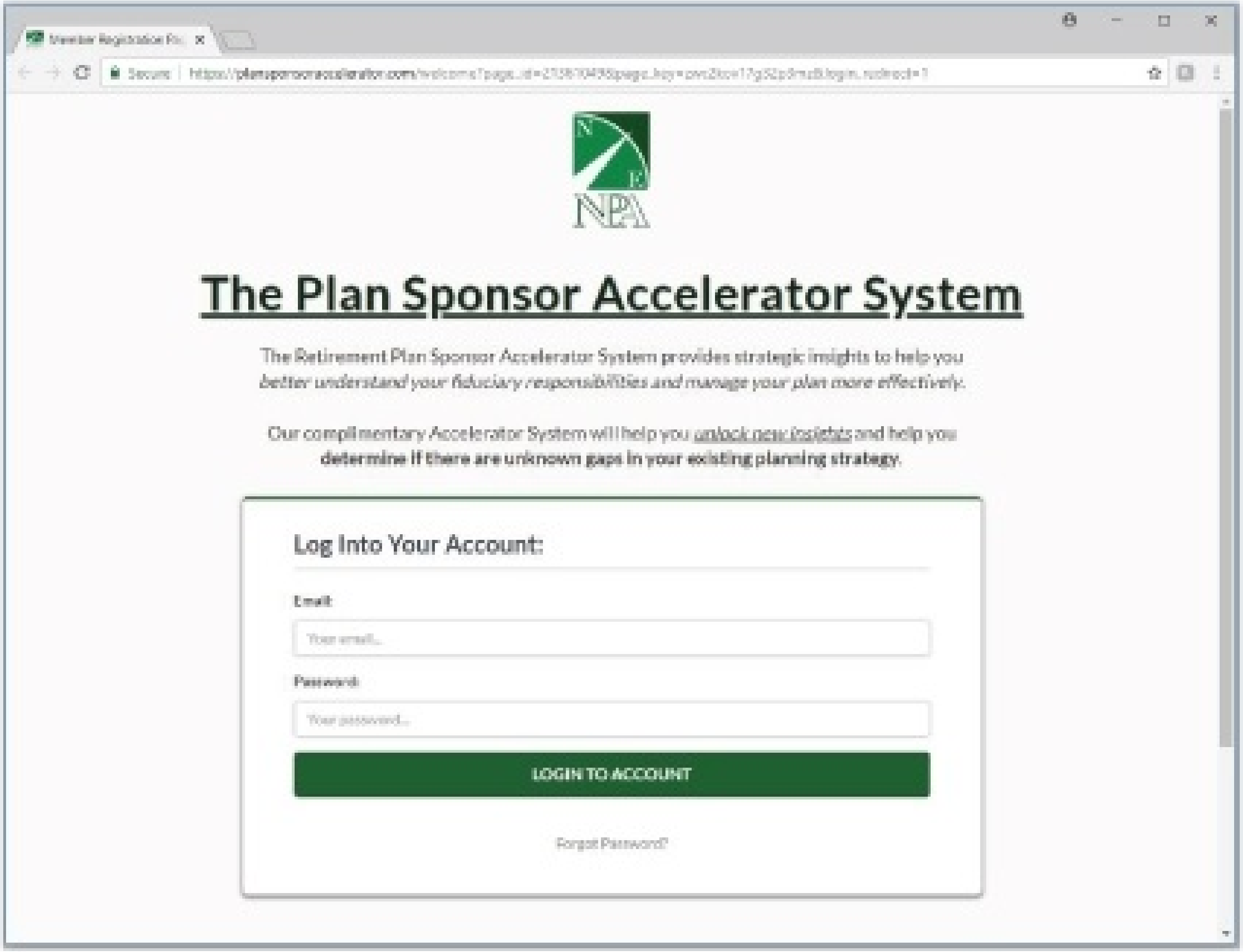

The Plan Sponsor Accelerator System

The Retirement Plan Sponsor Accelerator System provides strategic insights to help you better understand your fiduciary responsibilities and manage your plan more effectively.

If you manage retirement plans above $1.5 Million, then you are invited to enroll in our complimentary Retirement Plan Sponsor Accelerator System to help you unlock new insights and help you determine if there are unknown gaps in your existing planning strategy.

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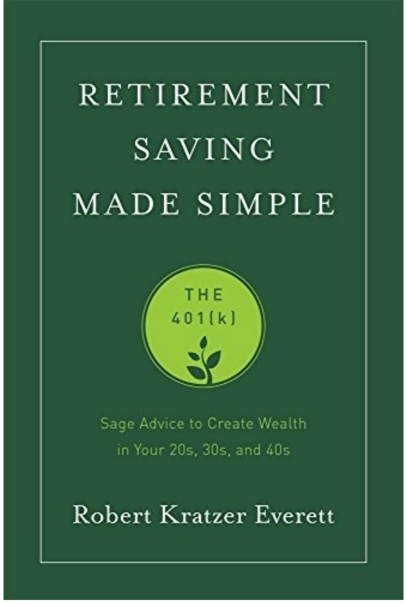

Read Bob's Book!

Bob Everett is the author of *Retirement Saving Made Simple: the 401(k) - Sage Advice to Create Wealth in Your 20s, 30s, and 40s*.

AVAILABLE ON AMAZON!

Our Resource Center features videos and articles about investments, tax strategies, and much more.

The Power of Tax-Deferred Growth

Why are 401(k) plans, annuities, and IRAs so popular?

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Traditional vs. Roth IRA

One or the other? Perhaps both traditional and Roth IRAs can play a part in your retirement plans.

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Ready for Retirement?

We enjoy building trusted relationships that span generations.

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Let's begin the conversation!

Name

Email

Phone

Question

SEND

Contact

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