BAYSTATE FINANCIAL

Guidance. Insight. Results.™

YOUR GUIDES ALONG THE WAY

Since its founding in 1901, Baystate Financial has provided comprehensive financial services, life and disability insurance, estate planning, business succession planning, retirement funding, education funding strategies, and investment management to a diverse client base. More than a century of providing guidance, insight, and results has made Baystate Financial one of the oldest and largest wealth management and financial services firms in New England.

Baystate Financial is comprised of a team of over 350 professionals and 250 support staff, many of whom contribute to building financial plans for a wide variety of individuals and businesses. Baystate Financial's strategy is tailored to help fulfill their client's individual goals, with the understanding that every client's goals are different.

WHY BAYSTATE FINANCIAL?

We aim to provide the best advice possible to each of our clients. We also continue to update our knowledge, by ensuring we keep up to date with legal and professional training, keeping ourselves informed of industry innovation so that we can give you the best possible service. The team at Baystate Financial has substantial experience of working with clients from across the financial spectrum.

At Baystate Financial, we also think it's important to understand our clients, and for our clients to understand us. We look at your entire financial position, your needs and what you want to achieve in life before helping you plan how to get there. Then we guide you through a simple step-by-step process to create a financial plan just for you.

YOUR FINANCIAL JOURNEY

From the beginning, a Baystate Financial Advisor becomes your personal guide and resource. In order to fit your individual goals and needs, we work with you to formulate a sound investment, insurance, and retirement strategy based upon your financial position.

From there, we help identify a broad range of financial products and services to complement your personalized plan. Whether we are helping articulate a strategy, monitoring your investments, or making recommended enhancements, our main objective is helping you achieve your financial goals.

Baystate Financial advisers go to great lengths to deliver the personalized attention and accessibility our clients have come to expect. We realize your financial strategy is more than managing money, it's providing the guidance, insight, results and service you need to secure your financial future.

OUR VISION AND VALUES

Baystate Financial has a team of professionals who are respected in the industry. These individuals are available as a resource to work with you and your advisor to design and implement a financial strategy to help you achieve your financial goals. Whether you are a business owner, rising executive or retiree, Baystate Financial has the expertise you need to develop a strategy designed to help meet your needs.

HOW CAN BAYSTATE FINANCIAL HELP ME?

Baystate Financial delivers advice. We believe that starting each relationship with a blank piece of paper and no products to sell is the best way to deliver professional and comprehensive Financial Planning.

Once we have implemented your personal financial plan, we will continue to develop our relationship with you. So much of Financial Planning is about mutual trust and respect, whether in the context of helping you invest for the future, protect your family or reduce taxes. We understand that the topics we discuss can be sensitive, and the questions we ask can be probing, but the motivation is to make sure we look after you. We believe in working in collaboration, but also appreciate that this sometimes takes time. Being part of your existing team, or building one around you where you also need legal or complex tax advice, is important to us.

Our financial planners are highly qualified with many having achieved the designation of Certified Financial Planner. Whether building a financial plan with you from the start, or reviewing your existing arrangements, we can provide professional advice to help guide you through the process of defining your goals and recommending a tailored strategy to meet your individual needs that will be flexible enough to adapt as your life changes.