Northeast Investment Management, Inc.

www.northeastinvest.com

Investment Management

Team

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Overview

We act as investment advisors to individuals, families, trusts, charities and other tax-exempt institutions.

With a focus on rigorous analysis and prudent selection of stocks, bonds and funds, we build customized portfolios for each client account based on their specific objectives and risk tolerances. This tailored approach to portfolio construction keeps clients focused on long-term preservation and growth of assets, not daily market fluctuations.

More on our investment approach.

Our investment management services include:

- Discretionary and non-discretionary account management
  - Individual and trust accounts
  - Qualified retirement accounts
    - Traditional IRA, Roth IRA, SEP IRA, Rollover IRA
  - Private foundations
  - Custodial and minor accounts
- Customized portfolios
- Investment analysis and selection
- In-house and institutional research
- Team-based client service

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