

James E. Moniz, CLU[®], ChFC[®], MSFS

Financial Advisor



Assisting individuals, families and businesses in the accumulation and protection of wealth.

- *Comprehensive Financial Planning*
- *Investment Management*
- *Estate Planning*
- *Executive Benefits Design*
- *Retirement Income Planning*
- *Business Succession Strategies*
- *Insurance Needs Analysis*
- *Education Funding Strategies*
- *Charitable Giving Planning*

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For more than thirty years, James E. Moniz has been committed to providing sound financial advice based on recent developments in the industry and timely research. Jim and his practice, branded as Northeast Wealth Management, have become the standard of the wealth management industry. Jim focuses on the needs of high net-worth individuals and successful professionals, tailoring financial programs to help them determine, and progress, toward their objectives.

Jim holds a Masters of Science in Financial Services (MSFS) with Graduate Certificates for specialized study in Pensions and Executive Compensation, Estate Planning and Financial Asset Management. He has achieved the Chartered Financial Consultant (ChFC[®]) and Chartered Life Underwriter (CLU[®]) designations.

Jim is a sought after speaker due to his extensive background and knowledge of the financial, estate, and retirement planning fields. Jim conducts educational programs for accountants, attorneys and financial planners. His lecture, "Doctors in Debt," has been presented to the graduating class of the Harvard Medical School.

As dedicated as Jim is to his clients, his greatest source of pride is his family. Jim resides in Hanover, Massachusetts with his wife, Kate, and their two children, Erin and Sam. In his leisure time he enjoys his family, friends, sports, traveling, jazz, fine dining, and premium cigars.