CRESTWOOD
ADVISORS

YOUR TRUSTED FIDELITY PARTNER

Crestwood Advisors has been a trusted parter to Fidelity Investments for more than two decades, providing custom wealth management services to high-net-worth and ultra-high-net-worth individuals and families. With Crestwood, you'll have confidence knowing that your clients' needs will be addressed through our extensive capabilities, collaborative approach, and focus on delivering real client impact.

WORKING WITH YOU

Experience working with a partner who provides:

Experienced Resources Dedicated to the Fidelity Relationship

A Seamless Client Transition Process

Capabilities to Handle and Simplify the Complex Needs of Your Clients

A Steadfast Commitment to Promoting the Fidelity Brand

OUR PARTNERSHIP PROCESS

We collaborate with you, employing a structured engagement process to:

1. **Facilitate** an initial discussion regarding the client opportunity, background, and next steps
2. **Coordinate** a meeting to include you and the prospective client at a time and location that suits the client circumstances
3. **Deliver** a comprehensive wealth management proposal including investing and financial planning observations and recommendations
4. **Enhance** the relationship through deep client engagement, open communication, and continuous feedback to you

Alex S. LaPointe
Director, Client Development

alapointe@crestwoodadvisors.com
(617) 226-0042 direct
One Liberty Square, Suite 500, Boston, MA 02109

Save My Contact Info

CRESTWOOD ADVISORS

Crestwood Advisors
Boston, MA | Providence, RI | Darien, CT | Boulder, CO
(617) 523-8880 | (877) 273-7896 | info@crestwoodadvisors.com