



## Jessica C. Welch, CFP®

PORTFOLIO MANAGER

617-248-4875 | jwelch@choate.com

### Overview

Jessica C. Welch is a Portfolio Manager at Choate Investment Advisors. She works closely with clients to understand their goals and risk tolerance and creates tailored solutions that meet their investment objectives. Jess has a certificate in Financial Planning from Boston University and is a CFP® certificant.

Prior to joining Choate Investment Advisors, Jess was a Portfolio Manager & Philanthropic Advisor at Lowell, Blake & Associates. She also spent 12 years working in fundraising for Boston-based charities including Community Servings and the Emerald Necklace Conservancy. Jess started her career at NorthStar Asset Management, where she was responsible for client services and operations.

### Related Services

- Investment Management
- Philanthropic Planning

### Education

- University of Vermont, BA (2000)