



Jessica C. Welch, CFP®

PORTFOLIO MANAGER

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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)