



## 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)