

Kelsey Sullivan, CFA

SENIOR INVESTMENT ANALYST

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Overview

Kelsey Sullivan is a Senior Investment Analyst at Choate Investment Advisors, conducting quantitative and qualitative research, and working closely with Portfolio Managers to source new ideas and assist in the development and delivery of personalized investment solutions for clients. She also brings significant investment experience to her work with private investments and public equities.

Prior to joining Choate Investment Advisors, Kelsey worked as an Equity Research Associate covering Financials at Putnam Investments and as a Client Relationship Specialist at Capital Group Private Client Services.

Education

- Villanova University, BA (2014)

Related Services

Investment Management

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