WEALTH MANAGEMENT

Personalized Wealth Management Services Tailored to Your Needs

At the Baystate Financial Medical Division, our personalized Wealth Services are different because we start from an understanding that no two practitioners (or their practices) are alike. Your talent, skills, dedication and hard work have gotten you to where you are today and the Baystate Financial MD team can provide the professional financial and investment management services to supervise, preserve and grow your wealth.

The Baystate Financial MD Approach

For each client, Baystate Financial MD assigns a dedicated, multi-discipline team of professionals, each of whom brings to the table a specific set of skills and experience working with medical practitioners to provide a comprehensive, customized solution for each client: be it asset management, asset protection, transfer of wealth to next generations on a tax advantaged basis, or a full wealth management program.

Like you, communication is often our most important tool and throughout our proprietary wealth management process, your Baystate Financial MD advisors will stay in constant communication to ensure that your exposure to risk remains in line with your stated strategies and that our targeted financial outcomes match your goals.

Baystate Financial MD can work with you on a variety of important Wealth Management services, including:

- Customized Wealth Management Programs
- Private Portfolio Management
- Asset Management
- Comprehensive Financial Planning
- Protection Strategies (including Annuities) Retirement Strategies
- Life and other Insurance Products Education Funding Strategies

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