

PLANNING FOR LIFE

Our Financial Planning service was founded on a simple principle: provide quality, confidential service and advice focused on your best interests. Achieving your financial goals requires the guidance of a Financial Planner who is backed by a company that employs a diverse team of specialists. With access to this expertise, your Financial Planner is able to deliver to you cutting-edge solutions that address your specific needs. Your Financial Planner's network of company specialists are:

EXPERIENCED and trained in individual and business planning strategies.

FOCUSED on keeping your financial planner up-to-date on legislative and regulatory changes that might impact your financial goals.

SKILLED in delivering cutting-edge financial strategies, effective product implementation and superior tactics designed to help you either stay on track or change course as your needs dictate.

DEDICATED to delivering state-of-the-art technology, including modeling and illustrative tools that show the "big picture" now and in the future.

COMMITTED to a shared mission with you and your advisors. Your Financial Planner's role is to recommend the most appropriate and cost-effective strategies and products that will help your plan stay aligned with your goals.



That's why Baystate is an industry leader in offering personal, face-to-face financial guidance and product solutions to medical professionals, business owners, executives and families with special needs.



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