Under Company Docs:

The forms below will assist you in understanding our firm better. The ADV forms are a uniform application for Investment Adviser registration with the Securities and Exchange Commission. They are useful when comparing one advisor to another as the questions are identical for all.

John – Title – Financial Planner/Partner

John became a partner of the firm in 2014. He graduated from Bentley College in 1996 with a degree in Economics-Finance. He is a Certified Financial Planner™ (CFP®). John’s professional affiliations include the Financial Planning Association (FPA) and National Association of Personal Financial Advisors (NAPFA). He has been quoted in national and local publications including the Wall Street Journal and Boston.com. Before joining the firm in 2007 he worked at Merrill Lynch, Ameriprise Financial and John Hancock. John lives in Pembroke, MA with his wife and two sons.