

Joseph C. Dudek, MBA, CLTC

Assistant Vice President - Sales

“Assisting families, businesses and professionals in the accumulation and protection of wealth.”



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Joe has been dedicated to assisting families, small businesses and individuals develop and achieve their unique financial goals for more than 4 years. His mission is to help his clients accumulate, enjoy, protect and distribute wealth in the most tax-advantaged way possible.

After graduating from the Endicott College with his MBA in 2005, he began his career with Boston Partners in 2006 and was promoted to Assistant Vice President of Sales in 2010. That same year, Joe was named a “Five Star Wealth Manager” in *Boston Magazine*.*

As well as maintaining his own practice, Joe has been an essential part of the Boston Partners Management team, promoting growth within the firm. Joe manages, trains and builds the skills of new associates as they begin the early stages of their careers. By helping them with case design and time management skills in the office, as well as developing their client relationship skills in the field, he is responsible for assisting new associates build successful practices.

Through his affiliation with Boston Partners, he has access to John Hancock products and services as well as a variety of other carriers. These services include Retirement Planning, Estate Planning Strategies, Portfolio Building, Disability Income Insurance, Asset Protection, Survivorship Protection and College Funding.

Joe is originally from Laconia, New Hampshire and currently resides in Manchester, New Hampshire. He is a member of the National Association of Insurance and Financial Advisors (NAIFA) and an active member of his community. When he is not assisting his clients you can find Joe playing hockey, tennis or boating.

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*The FIVE STAR Award is a client services award issued by Crescendo Business Services, based on an overall evaluation score of a wealth manager that reflects an average of all respondents and may not be representative of any one client's experience. The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services or magazine.

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