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Director of Advanced Sales & Education

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



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Michael's mission is to help his clients accumulate, enjoy, protect and distribute their wealth in the most tax-advantaged ways possible. He assists his clients in prioritizing their most important financial goals by listening to their needs and desires for the future. Based on these needs, he tailors specific financial strategies for each client.

Throughout his career, Michael has been recognized for his accomplishments and dedication to his clients. In 2010 and 2011 he was named a "Five Star Advisor" by Boston Magazine. He is a member of the National Association of Financial Advisors in addition to being a Qualifying Member of the Million Dollar Round Table (MDRT). MDRT is an international, independent association of financial professionals comprised of the top 1% of the world's best Life Insurance and Financial Service professionals. Michael is a Registered Representative who holds Life, Accident and Health and Series 6, 63, 65, 24 and 7 licenses.

Michael is a key member of the Boston Partners management team, promoting growth, productivity and ingenuity within the firm. As the Senior Vice President of Advanced Sales & Education, he is responsible for facilitating all training events and keeping each advisor equipped with the most current product and sales information.

Through his affiliation with Boston Partners Financial Group, LLC, Michael has access to a variety of financial products and services. These services include Fee-Based Financial Planning, Business Succession Planning, Retirement Planning, Estate Conservation, Portfolio Building, Disability Income Insurance, Asset Protection, Survivorship Protection and College Funding.

Michael is a native of Roswell, New Mexico who now currently resides in Concord, MA with his wife, Janet. One of his favorite pastimes is fishing with his grandsons.