Patrick A. Tannler
Executive Vice President - Sales & Marketing

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

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Patrick is a key member of Boston Partners Financial Group's management team, promoting growth and ingenuity within the firm.

Throughout his career, Patrick has been recognized for his accomplishments and dedication to his clients. Patrick is a Qualifying & Life Member of the Million Dollar Round Table (MDRT). He is also a perennial John Hancock ACE conference qualifier. Qualifying for ACE, puts Patrick among "the best of the best" in the John Hancock Financial Network.

He is a member of the National Association of Insurance and Financial Advisors (NAIFA) and member of The Concord, Massachusetts Chapter of Business Networking International (BNI). Patrick's successful business experience and knowledge has been acknowledged by Bentley College, Northeastern University, Saint Michael's College, Colby College, and Bowdoin College, where he has been asked to be a guest speaker.

Patrick'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 with 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.

Through his affiliation with Boston Partners, Patrick has access to a variety of financial products and services. These services include Retirement Planning, Estate Planning Strategies, Portfolio Building, Disability Income Insurance, Asset Protection, Survivorship Protection and College Funding.

Patrick is native of Lake Oswego, Oregon and currently resides in Concord, Massachusetts with his wife Donna Carlson.

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