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Boston Financial Management opens Portland office

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Abby Psychogeos

Katie Exchange

Portland, ME Boston Financial Management, LLC (BFM) has opened its first local office under the leadership of Maine native Abby Psychogeos.

Psychogeos serves as managing director and wealth manager. She is joined by associate wealth manager, Katie Exchange. As a team, and with the depth and expertise of their colleagues in Boston, they work with individuals and multi-generational families to help them achieve their investment and wealth management goals.

“Abby’s body of expertise has made her a tremendous asset to Boston Financial Management,” said Steve Kenney, CEO. “Since joining us in June 2018, it has been a priority for Abby to connect the resources that BFM has to offer with her clients in Maine and New Hampshire. Opening an office in

Portland made perfect sense for BFM as a firm, and especially for our northern New England clients.”

“Abby and Katie have brought the same quality of care to the design of the office as they do to their client portfolios and now can do so from the convenience of our downtown Portland location.”

Psychogeos has over 30 years of high-net-worth and trust management experience serving as managing director and president at Bainco International Investors and senior client advisor at F.L Putnam. Her community and charitable involvement includes chairman of Neurological Advisory Board and Presidents Advisory Council at Brigham & Women’s Hospital, treasurer and board member at MTH Foundation (2006-2018), board of trustees at Bowdoin College (2009-2012) and Junior Achievement of Maine.

“Being an independent, employee-owned business attracted me to Boston Financial Management initially, though it’s the combination of their proprietary investment process, advanced technology platform and a true culture of excellence that ultimately appealed to me,” said Psychogeos. “By opening an office in Portland, we can provide the services needed to handle the funds of multi-generational high-net-worth families while maintaining the intimacy of a boutique firm.”

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