



**Caitlin A. DeSoye**

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Caitlin has been working in the Financial Industry since 2004. She rejoined Baystate Financial Services in 2011. Prior to returning to Baystate, she spent four years at MetLife's Boston Home Office in various positions within the Financial Planning division. Caitlin joined Baystate in 2005 as a financial advisor.

As Director of Baystate's Financial Planning Department, Caitlin is responsible for overseeing the financial plan development process ensuring that recommended strategies meet a fiduciary standard of care for the financial well-being of clients, and working with advisors on expanding their client-service offerings.

Her role includes:

- ⇒ Providing comprehensive financial planning services for clients of the firm.
- ⇒ Analyzing client situations and developing recommendations for proposed planning solutions.
- ⇒ Approving financial plans for planners to deliver to clients.
- ⇒ Training the firm's financial advisors to contract and deliver financial planning services.
- ⇒ Creating financial planning practice management strategies

Caitlin is a 2005 graduate of Bentley College with a Bachelor of Science in Finance. She is currently finishing her final year at Suffolk University Law School with a concentration in Taxation and Estate & Business Planning.