

BAYSTATE FINANCIAL

Baystate is a premier, full service financial firm

- Founded in 1901 Baystate is one of New England's oldest and largest financial services firms offering comprehensive, individualized financial strategies for clients.
- Baystate's broad range of services includes financial planning, business and estate planning, and retirement and special needs planning. We also offer a variety of protection and investment products, including life, health and disability insurance and long-term care, mutual funds, annuities and IRAs.

Baystate offers comprehensive and coordinated service, not just products

- Baystate provides a unique, top-line client experience based on service. This qualitative approach enables Baystate representatives to develop comprehensive strategies and solutions and provide some of the best planning advice in the industry.
- Baystate representatives utilize three important steps: a qualitative fact finding process that includes face-to-face consultations with clients to understand their needs and goals: an analysis of findings to develop a comprehensive and customized financial strategy and recommendations: and implementation with periodic meetings and monitoring to ensure that clients are achieving their financial goals.

Baystate embodies Integrity, Trust, Professionalism and Competency

- Baystate is built on the principles of integrity, trust, professionalism and competency—values that make Baystate one of New England's most respected and successful financial services firms.
- Baystate and our team of associates, specialists and advisors are committed to these principles and provide clients with the necessary information and planning to help them achieve financial success and stability.

Baystate is a leader and an innovator through our use of specialists

- Baystate has pioneered a new model for financial services firms built on a solid infrastructure of specialists, who share their experience on a wide range of financial issues so that representatives can provide the best solutions to clients.

Baystate has a strong work and corporate philanthropy culture

- Baystate is a strong corporate and community partner dedicated to the clients and communities we serve throughout New England. Baystate participates in a variety of events and activities and drives to help those in need.
- Baystate Financial Charitable Foundation, through its mission of aiding children and children's charities, is committed to giving back to the community and will continue to grow and expand its philanthropic efforts.
- Baystate has been named as one of the best places to work by the Boston Globe, Boston Business Journal and Providence Business News as well as one of America's fastest growing companies by Inc. Magazine.

BAYSTATE QUICK FACTS

- Baystate Financial was founded in 1901
- Dave Porter is only the 5th managing partner in Baystate history
- Baystate has grown from 49 representatives in 1996 to 275 representatives today with offices located throughout New England.
- Baystate has an independent RIA, Baystate Wealth Management, and recently added *The Sports Group*.
- Baystate has been voted one of the best places to work by media throughout New England.
- www.baystatefinancial.com
- www.baystatefoundation.org
- www.baystatewealth.com



BAYSTATE
FINANCIAL

LOCATIONS

200 Clarendon Street, 19th Floor
Boston, MA 02116
Phone: 617-585-4500

301 Edgewater Place, Suite 200
Wakefield, MA 01880
Phone: 781-876-4100

100 William Street, Suite 300
Wellesley, MA 02481
Phone: 781-239-2000

One West Boylston Street, Suite 101
Worcester, MA 01605
Phone: 508-890-6200

900 Route 134
Towne Plaza
South Dennis, MA 02660
Phone: 508-760-4072

75 Leighton Road
Falmouth, ME 04105
Phone: 207-770-2000

20 Congress Street
Marshfield, MA 02050
Phone: 781-834-1111

1155 Elm Street
Manchester, NH 03101
Phone: 603-668-8380

302 Mountain View Drive, Suite 201
Colchester, VT 05446
Phone: 802-863-2801

149 Water Street
Exeter, NH 03833
Phone: 603-394-7880

402 Amherst Street
Nashua, NH 03063
Phone: 603-578-9899

401 Wampanoag Trail, Suite 100
East Providence, RI 02915
Phone: 401-434-7560



BAYSTATE
FINANCIAL

Securities products and services are offered through New England Securities Corporation (NES), a broker-dealer (member FINRA/SIPC). Certain investment advisory services are offered through New England Securities Corp. and other advisory services including portfolio management are offered through Baystate Wealth Management LLC, each a registered investment adviser. Baystate Wealth Management (BWM) and Baystate Financial Services (BFS) are affiliated entities, but they are not affiliates of New England Securities. Baystate Financial Charitable Foundation is not affiliated with New England Life Insurance Company (NELICO) or any NELICO affiliates. Each entity is solely responsible for the products and/or services it provides.L0613328454[exp0614][All States][DC]