

# Reinventing Wealth Management with an Application of Behavioral Finance

Northeast Wealth Management is a household name in the financial services space, known for its expertise in meeting the financial planning and investment needs of affluent clients. Adhering to its decades-old

legacy of offering specialized and personalized wealth management advisory services, it serves as a leader in helping its clients realize their dream legacies for themselves, their families, and their communities. At the heart of Northeast Wealth Management is its service portfolio, built on a solid foundation of in-depth industry expertise and ardent passion for client success. All of its offerings are designed with the right mix of behavioral finance and advanced financial planning strategies. This makes the firm ideally positioned to help clients follow good investment practices while minimizing all market-influenced wealth loss, with utmost privacy and discretion. The company's expertise also entails business succession transition, exit planning, and educating businesses on governance and potential equity. Northeast Wealth Management's philosophy of adding behavioral finance strategies into its offerings began 25 years ago when James E. Moniz tried to help a client struggling to deal with the estate planning process. After a few failed attempts with the client, he discussed it with his now business partner Kate Leonard, a clinical psychologist. They identified what was missing from his approach—the personal connection.

Moniz was quick to restructure his approach to client management, giving them a safe and trusted space to open up and be deeply involved in the process. This partnership and the unique mix of behavioral finance and advanced planning strategies are now at the core of Northeast Wealth Management, helping clients make essential financial decisions with increased peace of mind. "Our combined expertise makes us the most trusted partner for a broad clientele, who can better understand their needs and help attain their financial goals," says Moniz. Over time, Dr. Leonard became increasingly involved with the company. Her previous experience became one of the cornerstones on which Northeast Wealth Management is built. The empathy in Northeast Wealth Management's services is best portrayed through its Legacy Vision Approach™ that allows a step-by-step program for creating and preserving wealth, and positively impacting families. The four-step process consists of assessing and setting goals, developing strategies and customized



plans, assembling advisor teams, and plan implementation. This reduces vulnerability issues such as high taxes, incomplete or non-existent wills and trusts, tax-inefficient or underachieving investment portfolios, and undiversified assets. The company also offers

legacy vision functions that entail well-defined sessions on estate and wealth management, empowering clients with a mindset of confidence in their future. "Our combined expertise makes us the most trusted partner for a broad clientele, who can better understand their needs and help attain their financial goals."

"For decades, Northeast Wealth Management has been helping its clients realize their dream legacies for themselves, their families, and their communities. What lies at the heart of Northeast Wealth Management's prominent position in the space is its service portfolio built on a solid foundation of in-depth industry expertise and ardent passion for client success." [northeastwealthmanagement.com](http://northeastwealthmanagement.com)



**NORTHEAST WEALTH MANAGEMENT**

By means of our Legacy Vision Approach™, we help manage, create & preserve your wealth to have a positive impact on your family, and achieve your goals & wishes.

**Contact us today, (781) 353-5043**  
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**Jim Moniz, MSFS, Founder** | **Dr. Kate Leonard, Psy.D., Founder**  
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