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Beauport Financial Services Adds a New Key Team Member

Gloucester, MA February 13, 2023 - Beauport Financial Services is pleased to officially announce that they have added a new investment professional to their team; Mike Paluch.

Mike joins Beauport with over 15 years of industry knowledge, experience, and best practices from MFS, an investment management company in Boston. He has his Bachelor of Science degree with a major in business administration and a concentration in finance from Endicott College. Mike began his career as an intern at MFS and grew within the same company for 15 years. His most recent role was Manager of Investment Operations. His day to day work included managing daily functions of the investment department, reviewing and approving daily trade instructions, monitoring trade reporting, and overseeing special projects for internal system enhancements.

With his years of operational and managerial experience, Mike has transitioned into the Beauport culture nicely and makes a great addition to the team. Mike's role is focused specifically on Investment Operations. His responsibilities in his new role at Beauport Financial include: overseeing all client accounts and managing their asset allocations, reviewing cash balances, processing trades, and timely delivery of client distributions. Alongside with the Managing Partners and Investment Committee, he will work to implement the firm's investment strategies and rebalancing of custom portfolios. Mike will work closely with all members of the Investment Operations Team to ensure the accuracy of the Client Review Process and timely execution of client requests.

"We're thrilled to add Mike to our existing team and everyone is excited about having him onboard. He has a solid foundation in the financial service business and we hope to build on that significantly as he now holistically sees the investment, insurance and planning pieces come together for a client's benefit." - David McKechnie and Derek Reed, Partners

Beauport Financial Services was started in 1985, by principal Founder, David McKechnie. He was joined in 1997 by managing Partner, Derek Reed. Their experience and knowledge in the financial planning industry has allowed them to grow tremendously over the years as they serve retirees, families and business owner clients. Adding Mike Paluch is a testament to Beauport's continued growth and to enhancing the client service experience. Please join us in welcoming Mike to the firm!