



Diana B. Malcom

PRESIDENT & PRINCIPAL

Directions

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Services

Investment Management
Financial Planning
Personal Trusts & Fiduciary Services

Clients

Law Firms
Foundations, Endowments & Charities
Individuals & Families

Overview

Diana is president of Lowell, Blake & Associates. As the firm's president, Diana ensures that the firm delivers on its founding principles of independence, transparency and personalized service to clients. She finds great satisfaction in building an exceptional team of individuals committed to carrying out the LBA investment philosophy, methodology and commitment to client interests.

With over 20 years of investment experience, she is skilled in navigating clients through the cycles of the market. Her experience spans portfolio management, equity research and retirement and estate planning. Diana researches markets and companies, tracks emerging trends and guides investments with an eye toward individual client need. "This is a business where you are always learning something new whether it is a new product developed by a company that we are researching, developments in the global arena or changes in tax or estate law. I find it engaging and fulfilling work."

Diana finds great satisfaction in helping clients gain a full understanding and increased confidence regarding their investments and estate plans. She notes "I love the relationships I've developed with clients. Serving as a trusted advisor allows me to work through transitions and difficult life decisions to reach solutions that will work for them."

Diana received her BA from Bowdoin College. Before joining LBA, she worked at Brown Brothers Harriman. Currently she serves on the board of the MENTOR Charitable Trust.