



Jessica C. Welch, CFP®

PORTFOLIO MANAGER, PHILANTHROPIC ADVISOR & PRINCIPAL
Directions

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Services

Investment Management
Financial Planning
Personal Trusts & Fiduciary
Services

Clients

Law Firms
Foundations, Endowments &
Charities
Individuals & Families

Overview

In her Portfolio Manager role, Jessica works with clients in positioning portfolios to reflect their goals and risk tolerance. Jessica finds great satisfaction in helping clients gain a full understanding and increased confidence regarding their investments and estate plans.

Jessica spent 12 years fundraising for Boston-based charities including Community Servings and the Emerald Necklace Conservancy. Jessica also worked at NorthStar Asset Management, where she was responsible for client services and operations.

Jessica holds a Bachelor of Arts in History from the University of Vermont. She lives in Jamaica Plain with her husband and dog, a Jack Russell Terrier named Lacey. She served on the board of trustees at the Eliot School.