



## Nicole F. Gagliardi

MANAGING DIRECTOR OF OPERATIONS & PRINCIPAL  
Directions

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### Services

Investment Management  
Financial Planning  
Personal Trusts & Fiduciary  
Services

### Clients

Law Firms  
Foundations, Endowments &  
Charities  
Individuals & Families

### Overview

Nikki has worked in the financial industry for nearly 20 years and has been with Lowell, Blake & Associates since 2005.

As Treasurer of the Company Nikki oversees all financial functions including the budget, insurance, tax and all treasury related items. In addition, Nikki also handles HR-related issues. She plans, directs and carries out policies that relate to personnel. As Chief Compliance Officer she is responsible for LBA's SEC Compliance reporting regulations where she plans and directs policies and procedures to ensure that LBA is in compliance with regulatory requirements.

Prior to joining LBA, Nikki was a Branch Manager at Medford Co-operative Bank. She holds a BS from Salem State College.