



Patty Lavoie, CPA

FINANCIAL ADVISOR

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Patty enjoys working with clients to understand their goals and assist with coordinating all elements of their financial plan to help meet those goals.

Patty began her career in public accounting and has spent the majority of her time working in New England-based multi-family office firms, assisting clients with their financial, tax, and estate planning needs. In her most recent role at Fortis Management Group LLC, she was a client advisor to high-net-worth individuals and families, and she served as the firm's tax manager for over seventeen years.

Patty earned a Bachelor of Science degree in Accounting from Boston College and is a Certified Public Accountant.

Patty and her husband, Mike, enjoy spending time and traveling with their three adult children. Patty loves to cook for a crowd of family and friends, especially for holidays and football games.

RELATED SERVICES

Financial Planning

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Please Note: Limitations. The scope of any financial planning and consulting services to be provided depends upon the terms of the engagement, and the specific requests and needs of the client. Grimes does not serve as an attorney, accountant, or insurance agent. Grimes does not prepare legal documents or tax returns, nor does it sell insurance products. If the client desires, one of Grimes' representatives, in their separate licensed individual capacities, can be engaged to provide insurance sales/services as described on Grimes' written disclosure Brochure (a copy of which is linked to this website) per the terms and conditions of a separate engagement and fee.

