Pension & Wealth Management Advisors Adds James Boyd as Managing Partner

WALTHAM, MA, USA, November 1, 2023 /EINPresswire.com/ -- Pension & Wealth Management Advisors has recently announced the addition of James M. Boyd as a Managing Partner. In the new role, Boyd will be responsible for advising wealth management and institutional clients to help them achieve their long-term goals and objectives.


James M. Boyd - Managing Partner

With over 30 years of experience in the investment management industry, Boyd has worked as a senior portfolio manager and analyst on multi-billion-dollar equity strategies for institutional and high net worth clients. For most of the last 20 years, Jim has been working at Newton Investments and has prior experience at State Street Global Advisors, Fortis Investments, and John Hancock Advisors in similar capacities. Mr. Boyd comes to the firm with an M.S. in Finance from Boston College and is a CFA charter holder.

George P. Webb, CEO and Managing Partner of PWMA, said “We're very excited to have someone of Jim’s personal and professional caliber to join our firm. We have known Jim for many years and his proven track record of success in the investment management industry. He possesses a deep understanding of financial and capital markets and is equally skilled in managing relationships.” The addition of Boyd furthers PWMA’s goal of becoming one of the top boutique investment advisory and wealth management firms in the industry. The firm has an impressive roster of experienced advisors and has been making significant investments in state-of-the-art infrastructure, compliance and technology, and investment advisory talent.

Boyd commented, “I’m very excited to join such a high-quality team at PWMA. I have watched the development of the firm for the last several years with great interest and know firsthand that they have a strong commitment to their clients and excellence in every aspect of their business. I am confident that my years of experience in managing portfolios will be valuable to the team and our clients.” The firm only serves clients in a fiduciary capacity to ensure that they have a completely unconflicted relationship with those families and institutions that they serve.

About Pension & Wealth Management Services:
Pension & Wealth Management Advisors is a Registered Investment Advisor with the U.S. Securities and Exchange Commission. PWMA provides advisory expertise in Wealth Management, Asset Management, and Institutional Advisory services to help clients optimize their investment opportunities. Learn more at pensionwealth.com.

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