

Covid19 - Updates

Corona Virus Update – We Remain Open for Business

The Governor of Massachusetts, Charlie Baker, has asked that non-essential businesses close for two weeks starting today, Tuesday, March 24th through Tuesday, April 7th. Being a “financial services” business, we are on the list of businesses exempt from that requirement. Our staff has been given the option of working from home at their discretion. Both our Lexington and Easton, MA, offices will remain open and able to complete transactions as usual. If you want to discuss reallocating your account, transfer between accounts, deposit money or take a withdrawal we are here for you.

During these next two weeks, however, we will avoid meeting with clients face-to-face. This is for your protection and ours, and to maintain continuity of service. If you would like to have a conversation about your accounts, the markets, the implications of the several stimulus bills, or any other financial matter, we are happy to talk by phone or videoconference. Any signatures required for opening new accounts, making distributions or making certain investments that require additional signatures will be completed by e-signature when possible. If you need to drop off a check, we will be here to accept, but please understand that we will try to make the interaction as short, and physically distant as possible. Please feel free to mail or pass checks or other documents through the mail slot in our door if you'd prefer.

We realize this is a stressful a time for you. We are here for you during this time. If you would like to talk feel free to reach out. If you have friends or family members that would like to hear what we are thinking please have them reach out as well. We are here to help.