

In the Spotlight...



Our Mission – To always work in the best interests of our clients with unfailing integrity and transparency. October Mountain Financial Advisors delivers comprehensive wealth management services with years of experience, expertise and empathy in all areas of portfolio management, financial planning, trust administration and private banking.

Our Background – This is an alliance of two storied, independently owned companies based in western Massachusetts. Lee Bank and St. Germain Investment Management share client service and community values. The former has been serving the Berkshires since 1852, the latter serving institutional and private investors nationally since 1924.

Our collective experience in commercial and private banking, Trustee and trust administration, financial planning and portfolio management spans generations, and our approach to managing financial assets is rooted in one directive: *Do what's best for the client.*

Our Blueprint for Success – First and foremost, we are customer-centric in all departments. We compensate our employees through salaries and not through commissions. With no sales targets or sales incentives, potential conflicts of interest concerns are avoided and the interests of our clients and our firm are aligned.

We don't "bundle products," specify revenue targets or deal with complicated financial instruments such as hedge funds and the like. Rather, we employ a fundamental, conservative approach to long-term investing and in so doing, reduce the noise and distractions that are part of modern society. None of us react to investing fads or the "breaking news" common in today's media.

Our clients meet and speak directly with the investment professionals who understand their unique goals and objectives, and who make the investment decisions. This is in sharp contrast to many firms which utilize third-party investment solutions that typically add complexity and cost. We place a premium on transparency, and endeavor to make every client conversant and comfortable with the structure of their investments and progress toward achieving their financial goals.

Contact Information –

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