Cathy Bearce, CFP®, ChFC®, ADPA®

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Wealth Planning Advisor

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- Financial Second Opinion
- Lifetime Income Model
- Plan for Financial Comfort
- The Business Owner Model
- Legacy Discussion
- The Integrated 401(k)

As a Private Wealth Advisor, Cathy Bearce understands the positive impact financial planning can have on the quality of her clients' lives, and the difference it can make in guiding them to financial security.

Cathy specializes in helping diverse individuals, high net worth families, small business owners and executives take advantage of opportunities to pursue their personal vision of fulfillment. Her philosophy is to educate, encourage and empower her clients to make important financial decisions that can significantly impact their potential for success.

Dedicated to building long-standing relationships with her clients based on trust and respect, Cathy plays a key role in her clients' lives, guiding them with a high degree of engagement, responsibility and accountability. She has the greatest impact working with people who are open to new ideas and innovative solutions and who prefer comprehensive planning to piecemeal transactions.

Many clients come to Cathy for her knowledge in Estate Planning, Retirement Planning, Business Owner Succession, Wealth Management and Risk Management. She works in partnership with her clients' other trusted advisors to design and execute a dynamic financial plan that strikes a balance between risk and return, and incorporates strategies with the goal to protect clients' assets.

A strong believer in continuing education, Cathy's mantra, "The more I learn, the more I can bring to my clients," has served her clients well, helping them work towards long-term goals by finding creative solutions to complex challenges and problems. She and her team have a proactive and practical approach to service with a strong commitment to client satisfaction.

Cathy learned the value of discipline, strategic thinking and healthy competition as a Masters Nationals Champion. Competing at the highest levels of cycling, she cultivated the skills of knowing the competition, navigating through the challenges of the course and strategically positioning for the final sprint – all of which contribute to her proficiency and set her apart as a financial advisor.

Cathy qualified for the 2015 Million Dollar Round Table, has been listed three consecutive years (2013-2016) in Boston Magazine as a Five Star Wealth Manager*, and is affiliated with NAEPC, FPA and GBBC. Prior to entering the financial industry, Cathy earned Bachelor's degrees in both MIS and Electrical Engineering. Her distinctive background gives her a well rounded perspective and keen ability to help people understand how financial planning can help them to address diverse challenges and simplify their lives.

An irrepressible lover of adventure and challenge, Cathy has many interests, including sports, charitable activities and community service. In addition to her passion for mountain biking and cycling, she also enjoys hiking, golf, tennis and traveling. She overcame her fear of heights by daring to take up skydiving.

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