

# BEACON FINANCIAL PARTNERS, LLC

Boston • New York



## **Carol A. Davis** **Director of Client Service**

Carol has over 15 years experience in the financial services industry. Prior to joining Beacon Financial Partners, Carol was a Registered Representative and Sales/Marketing Administrator with Boston Partners Financial Group in Andover, MA.

Carol brings a wealth of knowledge and experience to Beacon Financial Partners and is committed to the highest level of personal service for the firm's clients. Carol is responsible for leading the firm in managing clients' life insurance portfolios, including preparing portfolio annual review, providing funding models, year-end reporting and all other policy administration needs. Carol serves as a liaison between our clients and insurance carriers and coordinates with legal counsel on the proper transfer and application of life insurance policies in an array of trusts. She plays an integral role in developing and maintaining strong relationships with life insurance carriers and providers of investment products. In addition she is responsible for the organization and execution of the consolidation of investment accounts, both qualified and non-qualified. Carol is responsible for the development of the firm's processes and procedures aimed at maintaining organization and efficiency.

In her free time Carol enjoys biking in the summer, cross country skiing in the winter, and spending time with her family and friends.

She earned her Bachelor of Science Degree in Health Care Administration from the University of Lowell. She is married with 2 sons.



## **CAROL DAVIS** **DIRECTOR OF CLIENT SERVICES**

[cdavis@beaconfpllc.com](mailto:cdavis@beaconfpllc.com)

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75 Arlington Street, Suite 500  
Boston, MA 02116  
ph (617) 217-2242  
fx (617) 217-2707

245 Park Avenue, 24<sup>th</sup> Floor  
New York, NY 10167  
ph (212) 572-6337  
fx (212) 792-4001