

Financial Advisors who serve Special-needs Families

2014

Cynthia Haddad
Bay Financial Associates
95 Sawyer Rd. Waltham, MA 02454
781-893-0909, 253
781-893-3565
chaddad@bfa-online.com
www.specialneedsplanning.com
Years of Experience- 15
Yrs offering financial advice- >10
BS-Economics/Finance
Certification- CFP

John Nadworny
Bay Financial Associates
95 Sawyer Rd. Waltham, MA 02454
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Years of Experience- 15
Yrs offering financial advice- >10
Advanced degree
CFP, ChFC, MBA

Rich Harwood
Harwood Financial
111 Washington St. 201C Plainville, MA 02762
508-809-6056
508-695-6630
Rharwood@metlife.com
Years of Experience- 20
Yrs offering financial advice- >10
Advanced degree
ChFC + other

Douglas Ewing
Merrill Lynch
125 High Street, 19th Floor Boston, MA 02110
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617-946-4379
d_ewing@ml.com
fa.ml.com/dougewing
Years of Experience- 1
Yrs offering financial advice- 1-4
Undergrad + Juris Dr. Suffolk Law School
CFP, Certified special needs advisor, Attorney for 12 yrs

Bill Cratty
Securitas Financial Group
1 Derby St., 2nd floor, Hingham, MA 02043
781-682-8106
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Bill_cratty@securitasfg.com
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Years of Experience- 7
Yrs offering financial advice- 5-10 years
Undergrad + advanced degrees
CFP, CPA-PES, ChFC

Peter J. Bacchiocchi
MetLife
1601 Trapelo Rd. Waltham, MA 02451
781-672-2844
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Years of Experience- 15
Yrs offering financial advice- >10
Masters in Nonprofit Management
MetDESK specialist

David Harman
AXA Advisors
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1-508-341-1638
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rayash14@msn.com
Years of Experience- 10
Yrs offering financial advice- >10
BA, MBA, MSW, CLU
ChFC

Al Temkin
Temkin Financial Group
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978-646-3017
978-646-1917
Atemkin@metlife.com
www.temkinfinancial.com
Years of Experience- 6
Yrs offering financial advice- >10
MBA
CLTC

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Years of Experience- 10
CLU, ChFC