Baystate Financial Specialists

Herbert K. Daroff, J.D., CFP®
Estate & Business Planning

Herb is an attorney by education and very proud to be a financial advisor by profession. He heads up ***Estate and Business Planning*** for Baystate Financial Services in Boston where he provides custom case design and is also available on a consultation basis. He has been actively involved in the financial services industry since 1973. Herb is on the faculty at Bentley University in Waltham, MA. Mr. Daroff graduated from Drexel University with a B.S. in Commerce and Engineering in 1975, and Temple University - School of Law with a J.D. in 1979.

Richard J. Petrucci, Jr., J.D., CPA, CFP®
Estate & Business Planning

Rick Petrucci focuses in the areas of estate planning, business succession planning, financial planning, executive compensation planning, taxation, asset protection planning, special needs planning, and elder law. Previously, Rick had been an estate planning attorney in private practice, an estate and business planning attorney with a national insurance company, and a tax lawyer with an international accounting firm. In addition to being an attorney, Rick is also a CERTIFIED FINANCIAL PLANNER™ certificant and a Certified Public Accountant. Rick graduated from Bryant University with a B.S. in Business Administration (Accounting and Finance) in 1988 and from Hofstra University School of Law in 1991.

Caitlin A. DeSoye
Financial Planning

Caitlin has been working in the Financial Industry since 2004. She rejoined Baystate Financial Services in 2011. Prior to returning to Baystate, she spent four years at MetLife's Boston Home Office in various positions within the Financial Planning division. Caitlin joined Baystate in 2005 as a financial advisor. As Director of Baystate's Financial Planning Department, Caitlin is responsible for overseeing the financial plan development process ensuring that recommended strategies meet a fiduciary standard of care for the financial well-being of clients, and working with advisors on expanding their client-service offerings.

Gregory J. Pinto, MBA, CLU®, ChFC®, CFP®
Chief Investment Officer

Gregory J. Pinto is the Chief Investment Officer for Baystate Wealth Management. Greg began his career in the financial services industry in 1991. He was promoted to Managing Associate of New England Financial Services, Rochester, NY, two years prior to joining Baystate Financial Services in 1997. Greg is the Investment Specialist for Baystate Financial Services. Greg received his MBA in Finance and Public Accounting from the William. E. Simon School, University of Rochester in 1989, and earned his Certified Financial Planner professional designation in 2001.

Baystate Financial Specialists

Anthony J. Leonardo, Jr., CLU®, ChFC®

Investment Management

Tony began his career in the financial services industry in 1981 and joined New England Financial as an investment specialist in 1983. Prior to joining Baystate Financial Services, Tony also served as president of financial services at Burgin Platner Hurley Insurance Agency, a prominent property and casualty insurance agency in Quincy, Massachusetts. Tony is a 1974 graduate of Bowdoin College and holds the Chartered Financial Consultant and Certified Life Underwriter designations from the American College.

Robert M. Piatelli

Life Insurance

Bob is the Director of Life Insurance Sales and Marketing. He began his career at Baystate Financial Services in 1975 before leaving to work at New England Financial in Product Design and Development for the next five years. He returned to Baystate Financial Services where he is now the Director of Life Insurance Sales and Marketing. With 35 years of experience in the life insurance industry he focuses on the sale and conservation of life insurance. Bob works closely with advisors to help them with case design that will assist them in finding the best solutions for their clients' needs.

Mark R. McManus

Annuities

Long-Term Care Insurance

Mark McManus heads the department of Annuity and Long-Term Care unit for Baystate Financial Services. Prior to joining Baystate Financial in January of 2006, Mark was a Regional Vice President with Metlife Investors covering Upstate NY and Western PA. Mark began his career in the financial services business during the spring of 1993 with the New England Financial firm located in Worcester. Two years later, he transferred to the H.O., where he has held various positions from Marketing Systems Consultant to Field Training Officer. In the fall of 1999, he joined NEF Annuities as Regional Marketing Director for the southeast region, and assumed responsibilities for the northeast region in January of 2001. .