

Your Primary Client Service Manager : John Gray

John Gray, your primary CSM joined Fidelity Investments in 1994. He has had multiple roles in both client facing and project management. In 2017 he took an opportunity to be a Financial Advisor with a Regional Bank. John rejoined Fidelity in January of 2022. He has a deep understanding of many of the service aspects that advisors need in order to be successful.

John earned a Bachelor's Degree in Business Administration from Salem State University in Salem Ma. He also has his Series 7 license.



Your Dedicated Client Service Team: Northeast Green



Corey Lindsey
Director



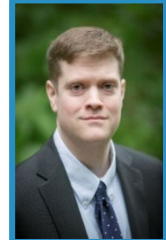
Kyle Ofgant
CSM



Nate Swartz
CSM



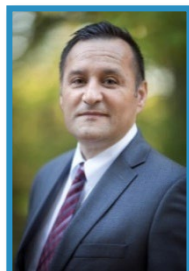
Crystal Lemons
CSM



Adam Whipple
CSM



Rob Terrasi
CSM



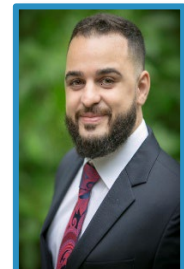
John Cardona
CSM



Tim O'Neill
CSM



David Simmons
CSM



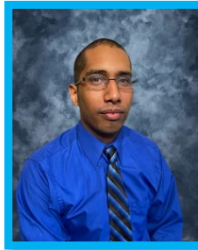
Joshua DaRosa
CSR



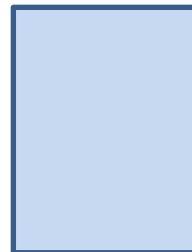
Cassidy Richberg
CSR



Grace Jamabo
CSR



Dijon Deleon
CSR



Edwin Vargas
CSR



Emma Driscoll
CSR

Contact Information

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Hours of Operation: 8:00 am to 8:00 pm EST

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