JONATHAN HOY

FINANCIAL ADVISOR

Jon Hoy is dedicated to the success of his clients and providing guidance and support to them through their various life events. Whether the need is saving for a child's education, planning and investing for retirement, improving income, insurance protection, or estate planning strategies, Jon is a sincere and knowledgeable partner in helping his clients succeed with their personal and financial goals. Jon's knowledge, accessibility, and focus on their comfort level has led to long-lasting relationships.

Jon's years of service, management, and investment experience has taught him that there is nothing more important than listening and understanding the needs of people in order to help them achieve their goals. Upon graduation from the University of Massachusetts at Amherst, Jon joined Marriott Hotels, spending a decade in management throughout the U.S. where he learned the importance of providing the highest levels of service. His interest in investing, paired with a desire to help and get to know people led him to his career in the financial industry. Jon's finance background includes working for major investment firms including Kidder Peabody Investments, Fidelity Investments, and Commonwealth Financial Network. Previously, Jon served 18 years as Senior Vice President for Middlesex Financial Group. In this role, Jon developed and managed the investments and financial planning division of Middlesex Savings Bank. He also was the lead Financial Advisor providing financial planning, investment management, and retirement income strategies.

When not advising clients, Jon enjoys spending time with his family and outdoor activities. Growing up on the water, Jon enjoys fishing and boating, as well as golf and skiing. He also loves to read and travelling with his family. Jon lives in Barrington, RI with his wife, Lynn and has two grown sons, Chris and Alex.

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