

Plimoth Investment Advisors[®]

Investment Management & Trust Services

Jeffrey Carter, CFP[®]

Vice President, Investment Officer

508-591-6217

JCarter@pliadv.com



Jeff has over 25 years of experience in the financial services industry. Prior to joining Plimoth Investment Advisors in 2014, Jeff was a Director of Client Services at Pyramis Global Advisors, the institutional fund manager of Fidelity Investments. In this role, which he held for six years, he was the primary contact for complex foreign and domestic client relationships, guiding client strategies in foreign and domestic equities, fixed income, high yield, emerging markets, and alternative strategies.

Prior to his role at Pyramis, Jeff spent five years as a principal and fixed income portfolio manager at State Street Global Advisors (SSGA). Before that, he spent 10 years at Fidelity Investments in various roles, starting on an operations team and leaving as a senior financial analyst. He started his career at State Street Bank & Trust Co. in a mutual fund accountant role in 1990.

Jeff earned his Bachelor of Science degree in economics and finance from Bentley University and received his Master of Business Administration degree from Northeastern University. Jeff became a Certified Financial Planner[®] in April 2017.

Jeff is a lifelong Massachusetts resident and currently lives in North Attleboro with his wife and three sons. He enjoys spending time with family and friends, rooting on all Boston sports teams, and working on classic cars.

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38 RESNIK ROAD, PLYMOUTH, MA 02360

www.plimothinvestmentadvisors.com