

Bay Colony Partners signs agreement with Dynamic Wealth Advisors

WOBURN - Bay Colony Partners, a privately held independent retirement planning firm specializing in the development of process driven plans and strategies for companies and individuals announced today that it has signed an agreement with Dynamic Wealth Advisors to provide an integrated wealth management platform for customer portfolio management and client reporting.

Dynamic Wealth Advisors will provide all "back office services" for Bay Colony Partners; the integrated wealth management platform includes a comprehensive financial planning program, data aggregation for most security holdings, a client "vault" for important documents and performance reporting as well as a secured portal for the clients to view their complete financial picture and safely store important private documents.

"We're more than pleased to announce our

agreement with Dynamic Wealth Advisors," said Dennis McCarron, Director - Compliance and Operations at Bay Colony Partners. "Our commitment to provide the most valuable services for our clients and Advisors is further enhanced with DWA's powerful system."

"By working with Dynamic Wealth Advisors and utilizing their highly recognized technical support services, we can focus on our core consultative work with clients," said Paul Escobar, Senior Vice President of Bay Colony Partners' Wealth Management Division.

"We look forward to our work with Bay Colony Partners and enabling the firm to operate in an efficient fashion through the use of our robust wealth management platform and RIA back office services," said Jim Cannon, Founder and Managing Principal of Dynamic Wealth Advisors.

