

Patrick Cote

Founding Partner at Consulate General of Canada (CTA Boston)

Boston, MA, US

Patrick Cote is an expert in providing tax-efficient investing for professionals, corporate executives and small businesses.

Biography

Prior to launching AssetGrade in 2013, Pat held a number of executive roles at Fidelity Investments, including running operations for communications and investment reviews for more than 13,000 clients with retirement plan assets totalling more than \$600 billion. Pat also ran strategy and acquisitions for OneShield, a KKR-backed insurance software and services provider. He is a former strategy consultant from Bain & Company in London and Boston. Pat is a Chartered Financial Analyst® and earned his MBA from the Wharton School of the University of Pennsylvania and his undergraduate degree from McGill University.

Industry Expertise

Investment Management

Areas of Expertise

Small Businesses, Tax-efficient Investing, Investments, Acquisitions, Corporate Strategy, Wealth Management, Financial Planning, Corporate Executives

Education

Wharton School - University of Pennsylvania

M.B.A. Finance

McGill University

B. Comm Economics & Finance

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