

Kelly Kimball

As Senior Wealth Management Officer, Kelly specializes in estate, gift, retirement and financial planning for individuals and families. Her primary focus is managing complex fiduciary relationships and coordinating client activities with their trusted advisors.

Experience

Kelly provided estate planning, estate settlement and trust services to clients throughout Vermont for TD Wealth Management, prior to joining People's United Wealth Management in 2015. She has over 20 years of experience in the financial services industry.

Professional Designations

Certified Trust and Financial Advisor (CTFA)

Affiliations

Vermont Elderly Resource Group (VERG) Board of Directors

Education

Champlain College, Associate's degree, Paralegal
Cannon Financial Institute Trust School, certificate



Kelly Kimball
Senior Wealth Management Officer
Wealth Management SVP
802-660-1494
Kelly.Kimball@peoples.com