Connect with an advisor — Select a location — Choose your advisor — Schedule an appointment

Let's help you connect with an advisor

We will meet you where you are on your financial journey and help you get to where you want to be.

To search for a Fidelity advisor, please use the slide bar below to indicate your current level of investable assets so we can help match you with the right level of advisors.

$500,000

$0 | $500,000 | $1,000,000 | $1,500,000 | $2,000,000+

Select a location

Feedback

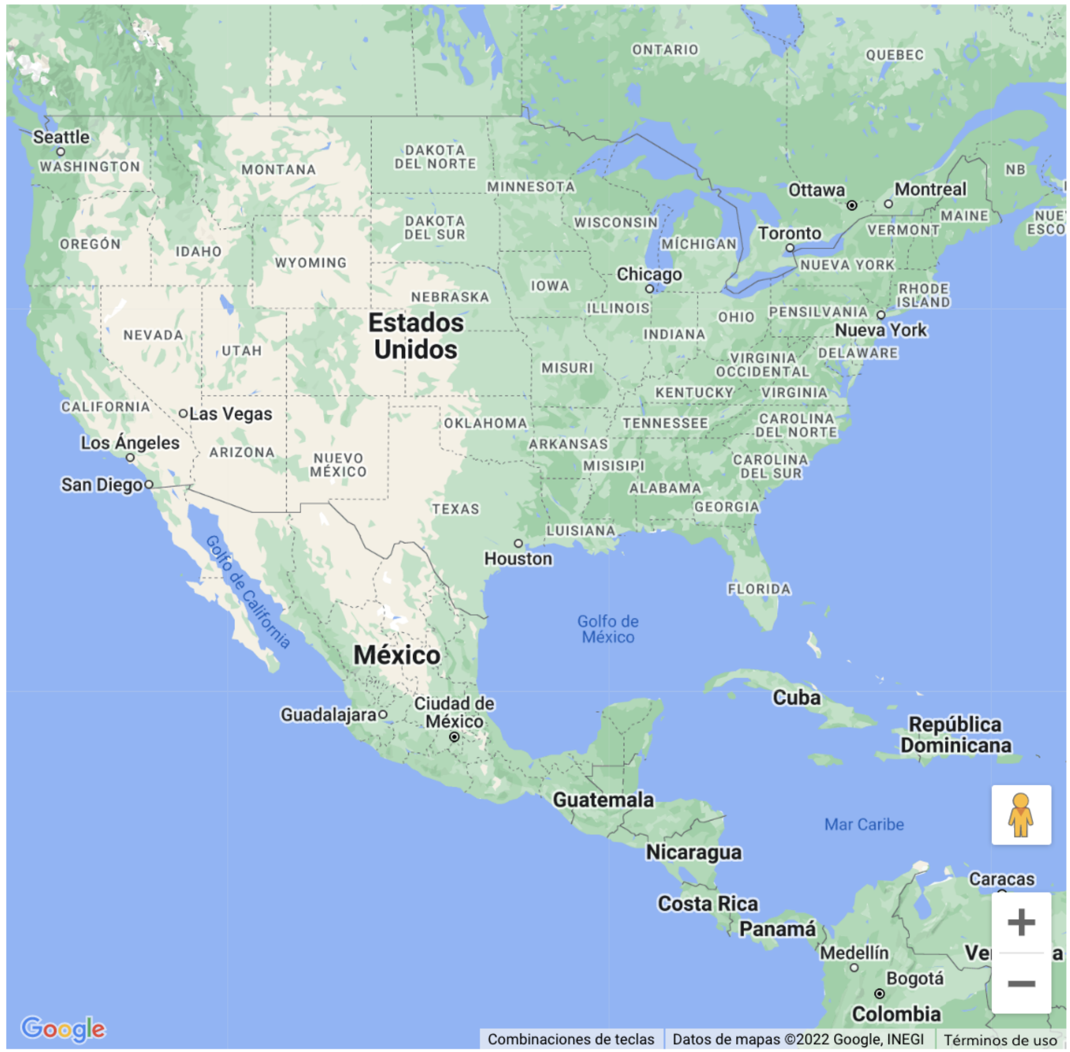
Connect with an advisor — Select a location — Choose your advisor — Schedule an appointment

Select a location

Enter your city and state or ZIP code to find a location near you with available advisors.

Enter your city and state or ZIP code [Search]

Enter a location above to see a list of centers.



Feedback

Connect with an advisor — Select a location — Choose your advisor — Schedule an appointment

Select a location

Enter your city and state or ZIP code to find a location near you with available advisors.

Enter your city and state or ZIP code | Search

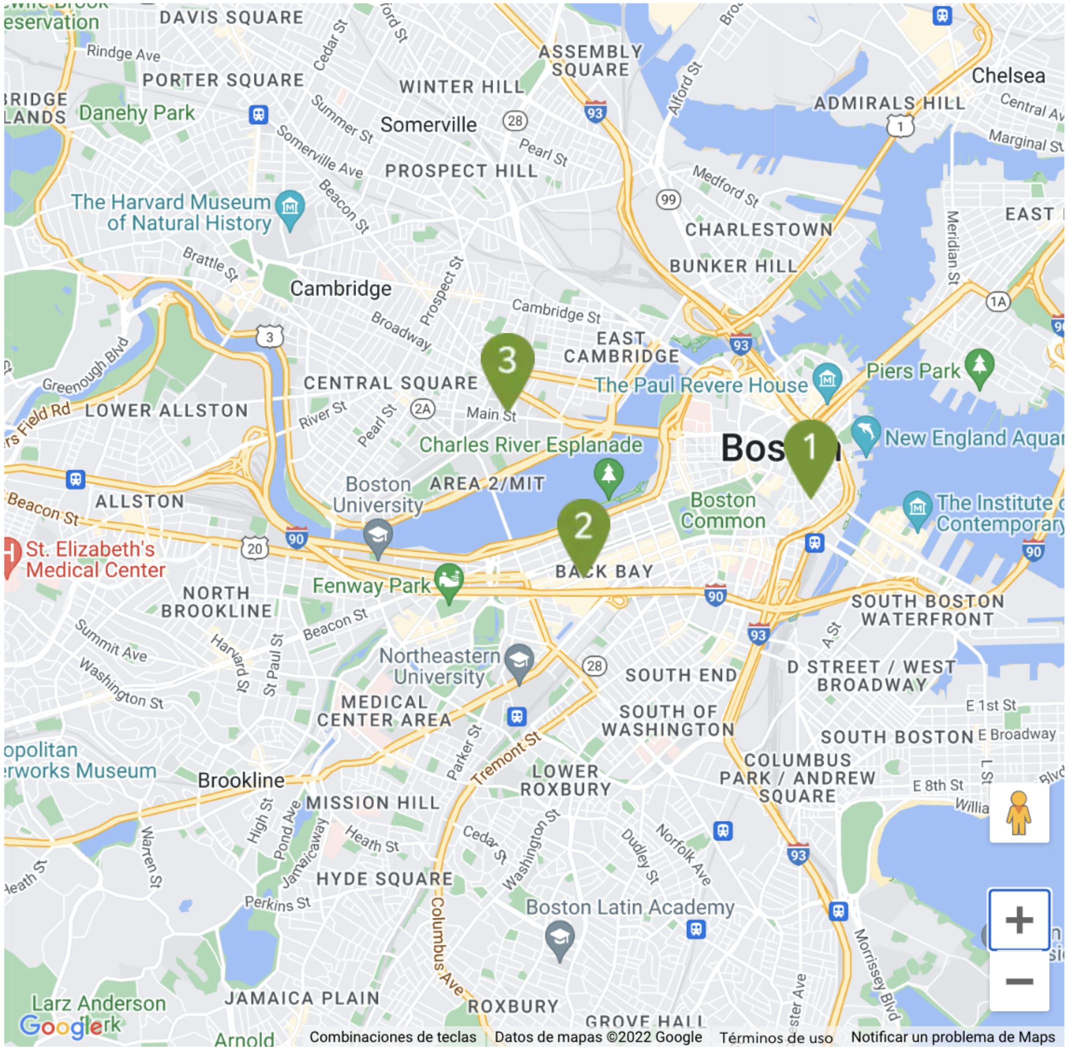
1 **Boston Congress Street** 0.35 Miles
155 Congress Street
Boston, MA 02110
Select an advisor at this location

2 **Boston Back Bay** 1.4 Miles
801 Boylston Street
Boston, MA 02116
Select an advisor at this location

3 **Cambridge** 1.62 Miles
200 Technology Square
Suite 101
Cambridge, MA 02139
Select an advisor at this location

4 **Chestnut Hill** 6.61 Miles
220 Boylston Street
Suite C115
Chestnut Hill, MA 02467
Select an advisor at this location

5 **Burlington** 11.53 Miles
44 Mall Road



Connect with an advisor — Select a location — Choose your advisor — Schedule an appointment

Choose your advisor in Boston Congress Street

Was this helpful? Yes No

Select an advisor at this Fidelity Investor Center to schedule an appointment. Additional information about Fidelity registered associates is available on FINRA BrokerCheck

Personal Info	About

Ellen O'Connell
Financial Consultant

Schedule an appointment

Next availability: Monday, Aug 08

"I joined Fidelity over 20 years ago, and have enjoyed a variety of roles, all focused on enhancing the financial wellbeing of our clients. I feel that education is the key to success and I work to help my clients navigate the crowded financial landscape; thereby allowing them to plan and invest with clarity and confidence. I believe our clients are central to everything we do and my goal is to partner with my clients and the people that are important to them to work towards financial success."

- Education: Merrimack College – Bachelor of Business Administration, Marketing

Experience and contact info | Fidelity Support Team

Randy Symank, CFP®
Financial Consultant

Schedule an appointment

Next availability: Monday, Aug 08

"As a Certified Financial Planner®, I provide high-net-worth clients peace of mind by partnering with them to create a financial plan. I believe that a financial plan can help more than just present-day clients but future generations as well. Known for keeping things simple (and encouraging clients to be curious and candid), I coordinate the input from a number of specialists, including Fidelity's Investment Team, Advanced Planners, and Insurance Consultants."

- CERTIFIED FINANCIAL PLANNER™ Certificant
- Education: University of California, Davis – Masters Degree, College of Letters & Sciences

Experience and contact info | Fidelity Support Team

Courtney Leous, CFP®
Financial Consultant

Schedule an appointment

Next availability: Tuesday, Aug 09

"I partner with my clients to create customized financial plans to help them work towards their long term goals. I strive to understand who and what is most important to you and your families so I can serve as your advocate. My goal is to help you achieve peace of mind in your financial lives as you grow, preserve, and distribute your wealth."

- CERTIFIED FINANCIAL PLANNER™ Certificant
- Education: Hobart and William Smith College – Bachelor of Arts (BA), Environmental Studies Major with Minor in Economics

Experience and contact info | Fidelity Support Team

Feedback

Ellen O'Connell, Financial Consultant

Ellen O'Connell
Financial Consultant

Boston Congress Street branch
155 Congress Street
Boston, MA 02110

EllenOConnell.team@fidelity.com
800-343-2140 ext. 78467

Availability | Advisor bio

Phone Appointment

Aug 05, 2022

60 minutes

Time shown in: Pacific Time

Fri Aug 5	Mon Aug 8	Tue Aug 9	Wed Aug 10	Thu Aug 11
—	—	—	6:30 AM	—
—	—	7:00 AM	7:00 AM	—
—	—	—	—	—
—	—	—	—	—
—	8:30 AM	—	—	—
—	9:00 AM	9:00 AM	9:00 AM	9:00 AM
—	—	9:30 AM	9:30 AM	9:30 AM
—	—	10:00 AM	10:00 AM	10:00 AM
—	—	—	—	10:30 AM
—	—	—	—	11:00 AM
—	—	—	—	11:30 AM

Feedback

Back to availability selection

Review & schedule

Wednesday, August 10, 2022

Phone appointment with Ellen O'Connell

9:00 AM – 10:00 AM Pacific Time

ADVISOR

Ellen O'Connell
Financial Consultant

CUSTOMER

First name

Last name

Email address

We'll send an appointment confirmation and reminder to this email address. All other Fidelity communications will still be sent to the email address on file.

Phone Number

Ellen will call you at this number. This does not change the primary phone number in the system.

ADDITIONAL ATTENDEES

Add a spouse, family member, power of attorney, etc. to this appointment. Additional attendees receive email confirmations and reminders related to this appointment.

Add someone to this appointment

Feedback