



**First United**  
Bank & Trust

## **Shane M. Small**

### Wealth Advisor



Shane is a Wealth Advisor with First United Bank & Trust serving the Frederick and Washington County, MD, Franklin County, PA and Berkeley County, WV markets. Shane has over fifteen years of local trust, investment and insurance experience. He began his financial services career as an insurance sales manager then progressed through various trust and investment roles.

At First United, we understand that growing wealth is just as important as protecting wealth and both require a well balanced thought-out strategy. Our wealth management process lays the foundation for success by creating a comprehensive picture of our client's unique goals, time frame and financial situation, so we can customize our investment management services to fit your needs. Once we understand your goals and beliefs, we can align investments, estate planning and trust solutions to help you achieve what matters most - your future!

#### **Education & Credentials**

- Bachelor of Science and Bachelor of Arts in Finance & Economics - Shippensburg University
- Licensed Series 7 and 66 representative
- Property & Casualty Insurance licensed
- Life, Accident and Health Insurance licensed

#### **Community Involvement**

- Mercersburg Rotary Club - past member
- PB Knickers Group - past member

#### **Areas of Focus**

- Wealth Management
- Investment Management
- Retirement Planning
- Estate Planning
- My Investment Resources

Shane is currently accepting new clients and appreciates your referrals. He welcomes the opportunity to meet with you to learn about your specific situation and explore whether he can be of benefit to you. Please contact him for more information or to schedule an appointment today.

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