

# Looking for Local Investment Services that combine credentials and commitments?



*Cheryl Smith*  
*Investment Executive*

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Cheryl brings extensive financial planning experience and comprehensive wealth management. She is registered in investments and licensed in annuities, as well as Life and Long Term Care Insurance. She has been in the financial services industry for over 35 years and is experienced at helping clients achieve their financial goals.

*Whether you're planning for retirement, a college education, taxes, or for heirs, it makes sense to speak with Cheryl first.*

## QUALIFICATIONS

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Series 7: General Securities Representative  
Series 24: General Securities Principal  
Series 63: Uniform Securities Agent  
Series 66: Registered Investment  
Advisor Representative  
Annuities, Life and Long Term Care Insurance

- IRAs: Traditional, Roth, Rollover and Simple; 401(k)s
- Education: 529 College Savings Plans, Coverdell ESAs, UTMA/UGMAs
- Mutual Funds: Over 1500 available
- Annuities: Fixed and Variable
- Insurance: Life and Long Term Care
- Brokerage Services: Stocks, bonds and other securities
- Separately Managed Accounts
- Small Business Services: SEPs, Keoghs, Simple Plans, 401(k) Plans, Individual 401(k); Employee Benefit and Succession Planning

Also, the full spectrum of wealth management services is available at Cape Cod Five, along with the experienced and professional guidance that will tailor your plan to your unique circumstances and financial objectives.

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*Cheryl is available at our Centerville, Hyannis, Yarmouth and Dennis Branches.*



CAPE COD FIVE INVESTMENT SERVICES

[WWW.CAPECODFIVE.COM](http://WWW.CAPECODFIVE.COM)

• NOT A DEPOSIT • NOT FDIC-INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NOT GUARANTEED BY THE BANK  
• MAY GO DOWN IN VALUE. Brokerage services are offered through INFINEX INVESTMENTS, INC., Member FINRA/SIPC.  
Cape Cod Five Investment Services is a trade name of the bank. Infinex and the bank are not affiliated.