

Looking for Local Investment Services that combine credentials and commitments?



Linda Vokey
Investment Executive

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Linda brings extensive investment and insurance experience. She is registered in investments and annuities, as well as licensed in Life and Long Term Care Insurance. She has been in the financial services industry for over 20 years 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 Linda first.

QUALIFICATIONS

Series 7: General Securities Representative
Series 24: General Securities Principal
Series 27: Financial Operations Principal
Series 63: Uniform Securities Agent
Licensed Massachusetts Insurance Producer

- 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.

Linda is available at our Falmouth, Mashpee and Sandwich branches.



CAPE COD FIVE INVESTMENT SERVICES

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.