

CAPE COD FIVE INVESTMENT SERVICES



Cheryl Smith

Investment Executive

Centerville, Hyannis, South Yarmouth
and Brewster Branches
of the Cape Cod Five Cents Savings Bank

800-678-1855 ext 196
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EXPERIENCE

- Extensive financial planning experience and comprehensive wealth management.
- Licensed in investments and annuities.
- Licensed in Life and Long Term Care Insurance.
- Has been in the financial services industry for over 30 years.
- Experienced at helping clients achieve their financial goals.

QUALIFICATIONS

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

RETIREMENT SERVICES

- Traditional IRAs, Roth IRAs, Rollover IRAs
- 401(k) Plans

EDUCATION SERVICES

- 529 College Savings Plans, ESAs, UTMA/UGMAs

MUTUAL FUNDS

- Wide Choices of Mutual Fund Families available

ANNUITIES

- Fixed
- Variable

INSURANCE

- Life Insurance
- Long Term Care Insurance

BROKERAGE SERVICES

- Stocks, bonds and other securities

SEPARATELY MANAGED ACCOUNTS

SMALL BUSINESS SERVICES

- SEPs, Simple Plans and 401(k) Plans
- Employee Benefits
- Succession Planning

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

You may call for a financial consultation without obligation.

Call Cheryl today.



Securities Offered Through
INFINEX INVESTMENTS, INC.
Member FINRA, SIPC