



First United
Bank & Trust



Annette M. Chapman, CFP®

Vice President and
Senior Wealth Advisor

Education & Credentials

- Bachelor of Science in Accounting - University of Maryland University College
- Honors graduate of Cannon Financial Institute Trust School
- Certified Financial Planner™
- Registered Series 7, 63 & 66 representative
- Life, Accident, and Health Insurance - Maryland
- Property & Casualty Insurance License

Community Involvement

- Garrett Mentors - Treasurer & Board Member
- Cindy's Fund - Board Member

Areas of Focus

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

Annette is Vice President and Senior Wealth Advisor with First United. Annette has 40 years experience in the financial services industry specializing in wealth management, estate planning, trust administration and financial planning for clients.

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!

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



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