First United
Bank & Trust

Dave Upole

Vice President and Senior Wealth Advisor

Education & Credentials

- Bachelor of Science in Finance & Economics - Frostburg State University
- Canon Trust School
- Registered Series 7, 24, 63, 65 and 66 representative
- Life, Accident and Health Insurance license - MD, PA & WV

Areas of Focus

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

Dave is a Senior Wealth Advisor with First United Bank & Trust. Dave was previously employed at several regional banks in a wealth advisory role before coming to First United. He has over 20 years of 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!

Dave 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 today.

Digital Contact

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