



First United
Bank & Trust

Julia Hershman, **CFP®** Wealth Advisor

Education & Credentials

- Bachelor of Science, dual major in Business Administration and Economics - Frostburg State University, Frostburg, MD
- Certified Financial Planner™
- Life and Health Insurance License - Maryland, West Virginia, and Pennsylvania
- Series 7 & 66

Community Involvement

- Potomac Highlands United Way - Endowment Chair

Areas of Focus

- Wealth Management
- Investment Management
- Retirement Planning
- Estate Planning
- Insurance

Julia is a Wealth Advisor with First United Bank & Trust. Julia has 10 years of experience in customer service specializing in accounting and analyzing economic and social trends. Julia serves a select group of families and businesses who are focused on growing, protecting and preserving wealth for their families, business and non-profit organizations.

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 investment, estate planning and trust solutions to help you achieve what matters most - your future!

Julia 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 today.



Digital Contact

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