



**First United**  
Bank & Trust

## Shane M. Small

Vice President and  
Senior Wealth Advisor - Team Lead

### Education & Credentials

- Bachelor of Science and Bachelor of Arts in Finance & Economics -Shippensburg University
- Lincensed Series 7 and 66
- Property & Casualty Insurance licensed
- Life, Accident and Health Insurance licensed

### Community Involvement

- Mercersburg Rotary Club - past member
- PB Knickers Group - past member

### Areas of Focus

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

Shane is Vice President and Senior Wealth Advisor - Team Lead with First United Bank & Trust serving the Washington County, MD and Franklin County, PA. Shane has over 25 years of local trust, investment and insurance experience. Shane serves a select group of families and businesses who are focused on growing, protecting and preserving wealth for their families, businesses 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!

Shane 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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