First United
Bank & Trust

Trevor Phillips

Wealth Advisor Associate

Education & Credentials

- **FINRA Series 7 and SIE**
- **NASAA Series 66**
- **Life and Health Insurance Producer License**
- **Property and Casualty Insurance Producer License**

Areas of Focus

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

Trevor is a Wealth Advisor Associate with First United Bank & Trust. Trevor has a strong track record of leadership and sales performance in the insurance agency. Trevor serves clients 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 align investment, estate planning and trust solutions to help you achieve what matters most - your future!

Trevor 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 Trevor today.

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