First United
Bank & Trust

Wealth Advisor

Education & Credentials

- Bachelor of Science, Concentration in Accounting - Sheperd University
- Masters of Finance - Liberty University graduate
- Cannon Trust School - graduate
- Series 6, 63 and Life and Health - licensed
- Certified Financial Planner© program - enrolled

Community Involvement

- United Way - Volunteer

Areas of Focus

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

Brandi is a Wealth Advisor with First United Bank & Trust. Brandi has three years of experience in the financial services industry specializing in wealth management, estate planning, trust administration and financial planning for clients. Brandi 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 align investment, estate planning and trust solutions to help you achieve what matters most - your future!

Brandi 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 Brandi today.

Digital Contact

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