



# Jason D. Walls

## Senior Wealth Advisor Team Leader



Jason is a Senior Wealth Advisor - Team Leader with First United Bank & Trust serving the North Central West Virginia market. Jason has over 17 years 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 investment, estate planning and trust solutions to help you achieve what matters most - your future!

### Education & Credentials

- Fairmont State University
- Registered Series 7 and 66 representative
- Life, Accident and Health Insurance license

### Areas of Focus

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

Jason 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 for more information or to schedule an appointment today.

Suncrest Community Office  
651 Suncrest Town Center  
Morgantown, WV 26505

Office 1-304-291-9510  
Toll Free 1-855-829-7192  
Fax 1-304-598-5758

[jwalls@MyBank.com](mailto:jwalls@MyBank.com)