

Introducing Your Personal Investment Executive



Peter B. Levine

Investment Executive

Lee and Great Barrington
Branches of Lee Bank

413-243-9229

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Experience

- Licensed in investments and life, disability, and long term care insurance.
- Has been in the financial services industry for 12 years.
- Experienced at helping clients achieve their financial goals.

Qualifications

- Series 7: General Securities Representative
- Series 63: Uniform Securities Agent

Products & Services

- Retirement Services, Traditional IRA's, Roth, IRA's, Rollover IRA's, Simple IRA's
- 401(k) Plans

Education Services

- 529 College Savings Plans, UTMA/UGMAs, ESAs, Mutual Funds
- Wide Choice of Mutual Fund Families

Annuities

- Fixed and Variable

Insurance

- Life Insurance
- Long Term Care Insurance
- Disability Insurance

Small Business Services

- SEPs, Keoghs, 401(k) Plans
- Employee Benefits
- Succession Planning

whether you are planning for retirement, a college education, taxes, or for heirs, it makes sense to speak with Peter first. you may call for a financial consultation without obligation. call Peter today.

