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Nasdaq 2146.04 **-10.78** 5:30pm
S&P 500 1091.38 **-3.52** 5:01pm

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Edward W. Rogers, Jr.

Senior Vice President - Wealth Management
Retirement Plan Advisor
Wealth Advisory Specialist / Financial Advisor

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Associations

- Past Falmouth Legion Baseball Board Member
Falmouth, ME
- Past Falmouth Babe Ruth Baseball V.P.
- Former North Yarmouth Academy Boys Head Varsity
Basketball Coach
- Safe Passage Golf Tournament
Founder
- Center For Grieving Children Golf Tournament
Founder
- Sebago Lakes Region Chamber of Commerce
2009 Golf Tournament Committee Member

Business Experience

- **2006 - Present: Morgan Stanley Smith Barney***
Senior Vice President - Wealth Management
Retirement Plan Advisor
Wealth Advisory Specialist / Financial Advisor
Portland, ME
- **1990 - 2006: Legg Mason**
Senior Vice President - Investment
Retirement Plan Consultant
Wealth Management Specialist
Portland, ME
- **1981 - 1990: Shearson**
Sales Manager
Senior Vice President - Investments
Portland, ME

Services

- 529 Plans
- Retirement Planning
- Wealth Management
- Asset Management
- Estate Planning
- Financial Planning
- Fixed Income
- Long Term Care Insurance

Education and Licensing

- B.A. - Economics, 1981
Minor - Mathematics
Bowdoin College
Brunswick, ME
- Cheverus High School, 1977
Portland, ME
- Guided Portfolio Management Program

Honors and Recognitions

- Guided Portfolio Manager
- President's Council at Smith Barney
- Chairman's Council
Legg Mason
- President's Council
Legg Mason

- Municipal Bonds
- Philanthropic Services
- Qualified Plans
- Women and Company®
- Professional Portfolio Management
- Education Planning
- 401k Rollovers

Welcome



As your Financial Advisor, I will spend the time to understand your financial concerns and work in partnership with you to develop a customized investment program that can best meet your needs. As our relationship builds over time, I will be able to anticipate your changing circumstances and help advise you on appropriate investment strategies. I look forward to serving your long-term investment needs. Please feel free to call me at any time.

Ask me about Women & Co.®, a program offered by Citi to help women address the unique financial challenges they may face in their lifetimes. Visit www.womenandco.com.

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