



# Investment & Insurance services.

Meet our Infinex Financial Advisor



**Frederick C. "Eric" Brose**  
**Vice President & Financial Designer, Fidelity Bank Financial Advisor, Infinex Investments, Inc.**

Supervising Office:  
465 Shrewsbury Street  
Worcester, MA 01604

## Education and Experience:

- MBA, Tulane University, New Orleans
- BA, George Washington University
- Financial Advisor since 1999
- Series 7: General Securities Representative
- Series 63: Uniform Securities Agent
- Series 65: Uniform Investment Advisor

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## We care about your financial future.

Through our caring LifeDesign approach, our goal is to prepare you or your business for every stage of your financial life and help you get where you want to be. We want you to be ready for all the things life could have in store. To fulfill this mission, Fidelity Bank offers access to investment and insurance services through Infinex Investments, Inc.

Our Infinex financial professionals are here to work with you to create a financial plan that fits the financial goals and dreams for yourself and for your business. Regardless of where you are in your financial life cycle, we can provide valuable guidance, premier products and services, and a financial plan that meets your goals.

Whether it is retirement planning, life insurance planning, asset protection strategies, 401k management, or even education planning, there is no better time than now to plan for your future.

Leominster Worcester Fitchburg Gardner Shirley Barre Millbury Paxton Princeton

 **Infinex**  
FINANCIAL GROUP

located at

**Fidelity Bank**

Helping you get where you want to be<sup>SM</sup>



# Our Investment & Insurance services include:

## Advising and Consulting

- Wealth Management
- Retirement Planning
- Retirement Income Generation
- Medicaid Concerns

## Retirement Services

- IRAs – Traditional, Roth, Simple, SEPs
- 401k Rollovers

## Brokerage Services

- Managed Wealth Approaches
- Bond Portfolios
- Mutual Fund Investment and Management
- Structured CDs and Structured Notes

## Insurance Solutions – Investing

- Annuity Options
  - Growth Oriented
  - Income Generation
  - Protection and Legacy

## Insurance Solutions – Life & Health

- Temporary and Permanent Life
- Protection for Mortgage, College and other Family Expenses
- Long-Term Saving and Future Income Solutions
- Disability Insurance
- Long-Term Care Insurance

## Education Funding

- 529 Plans
- Insurance Solutions

## Small Business Services

- SEP IRAs, Simple IRAs
- 401k Plan Consultation and Coordination
- Individual 401k Plans
- Buy-Sell Insurance Solutions
- Key Man Life Insurance

Call us today to schedule a complimentary LifeDesign® review and get started on the road to financial freedom and peace of mind.

**508.762.3609 • [fidelitybankonline.com](http://fidelitybankonline.com)**

[Leominster](#) [Worcester](#) [Fitchburg](#) [Gardner](#) [Shirley](#) [Barre](#) [Millbury](#) [Paxton](#) [Princeton](#)

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