

Peter J. Fredericksen

Financial Advisor

Peter J. Fredericksen is a financial advisor with Osaic Institutions, Inc., located at Bank of Canton. Peter specializes in pre- and post-retirement planning, estate planning, and asset protection. His primary objective is to work with his clients on increasing income, reducing taxes, maximizing overall returns, and protecting assets.

Peter holds FINRA Series 7 and 66 securities registrations, as well as Accident and Health or Sickness Insurance and Life Insurance licenses. He also holds the designations of Retirement Income Certified Professional (RICP®) and Certified Estate Planner (CEP®)*.

Prior to joining Osaic Institutions, Peter worked at BankFive in Dartmouth and Morgan Stanley in downtown Boston. He earned his BA in Economics from Boston College and his MBA from Suffolk University.

Peter lives in West Bridgewater with his wife, Ann Marie, and their three children, Natalie, Derek and Christian.

**Contact Peter today at 781-830-6152
to have a conversation about your
investment and insurance options.**



"I consider it a great privilege to help my clients achieve their financial goals and approach their retirement years with confidence and purpose. Some clients have been new to financial planning and unsure where to begin; others are experienced investors who simply want an experienced opinion. I always tailor my work to suit each client's unique needs and goals, wherever they may be in their financial journey."

*The CEP® (CERTIFIED ESTATE PLANNER™) is a trademark registered with the United States Patent and Trademark Office, and solely owned by the National Institute of Certified Estate Planners, Inc. This certification mark is awarded to individuals who successfully complete the NICEP Certification requirements and who also comply with annual maintenance requirements.

Investment and insurance products and services are offered through Osaic Institutions, Inc., Member FINRA/SIPC. B.O.C. Financial Services is a trade name of Bank of Canton. Osaic Institutions and Bank of Canton are not affiliated. Products and services made available through Osaic Institutions are not insured by the FDIC or any other agency of the United States and are not deposits or obligations of nor guaranteed or insured by any bank or bank affiliate. These products are subject to investment risk, including the possible loss of value. Osaic Institutions does not offer tax advice; please contact your tax advisor.



**B.O.C.
FINANCIAL
SERVICES**

781.830.6152
peter.fredericksen@osaicinstitutions.com

www.ibankcanton.com
557 Washington Street, Canton