

*News from Lowell Five Bank*  
**For Immediate Release**

February 28, 2018

**LOWELL FIVE BANK NOW WORKING WITH KAF FINANCIAL ADVISORS, LLC  
AND LINCOLN INVESTMENT TO PROVIDE WEALTH MANAGEMENT SERVICES TO  
PERSONAL AND BUSINESS CUSTOMERS**

*Lowell, MA* - David E. Wallace, President and Chief Executive Officer of Lowell Five Bank recently announced a new arrangement with KAF Financial Advisors, LLC ("KAF") and Lincoln Investment.

"Lowell Five is very excited about this new agreement. Similar to Lowell Five Bank, KAF advisors are fully committed to providing quality wealth management products and services. We couldn't have chosen more like-minded people who share our core values", said Dave Wallace.

James C. Shannon IV, CFP and Thomas McCarthy, ChFC at KAF, work in conjunction with Amy Fernandez, Financial Services Representative at Lowell Five to provide personal and business financial planning consulting services to Lowell Five customers. KAF consultants employ a comprehensive approach to wealth management offering services which include, but are not limited to, investment advisory services and insurance. Using financial modeling to analyze the client's situation, KAF advisors evaluate alternatives when developing a financial strategy.

According to Shannon, "Our team is honored to be selected as the wealth management advisors for the Lowell Five Bank. We are eager to leverage our experience and skills to service the needs of Lowell Five customers through our customized financial planning experience."

###

3 photos attached:



Amy Fernandez  
Financial Services Representative  
Lowell Five Bank



James C. Shannon IV, CFP  
KAF Financial Advisors, LLC



Thomas McCarthy, ChFC  
KAF Financial Advisors, LLC

**More...**

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**LowellFive**<sup>®</sup>  
The Relationship Bank

## *News from Lowell Five Bank continued...*

### **About Lowell Five**

Lowell Five is a trust worthy community bank that provides comprehensive loan, deposit, insurance and investment products for individuals, businesses, municipalities and non-profit organizations across 16 convenient locations throughout the Merrimack Valley and Southern New Hampshire. Lowell Five is a locally governed and managed full-service bank with over 160 years of consistent strength and stability. Deposits are insured in full through both the Federal Deposit Insurance Corporation (FDIC) and the Depositors Insurance Fund (DIF). For more information, call 800.931.FIVE or visit [www.lowellfive.com](http://www.lowellfive.com).

### **About KAF Financial**

KAF Financial Advisors, LLC was founded to provide personal and business financial planning for their clients. The advisors provide innovative and diverse financial services by blending technical skills and experience to help solve financial issues. They develop solid financial plans based on each client's unique needs for the future. Their team of highly skilled specialists are dedicated to creating long-term strategies that help develop a client's overall financial well-being. For more information call (781) 356-2200 or visit <http://www.kaffinancialadvisors.com/>

Products offered through KAF Financial Advisors, LLC and Lincoln Investment are not FDIC Insured. May Lose Value No Bank Guarantee.

Advisory services offered through Capital Analysts or Lincoln Investment, Registered Investment Advisers.

Securities offered through Lincoln Investment, Broker/Dealer, Member FINRA/SIPC [www.lincolninvestment.com](http://www.lincolninvestment.com). KAF Financial Advisors, LLC and the above firms are independent and non-affiliated.

Lincoln Investment and KAF Financial Advisors, LLC are not affiliated with the Lowell Five Cent Savings Bank.

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