



CELEBRATING
55 YEARS

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Charles Harvey Vice President of Investments UBS Financial Services

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Name: Charles Harvey

Title: Vice President of Investments

Company: UBS Financial Services

Location: 1099 Hingham St., Rockland, MA 02370

Birthplace and year: Wilmington, Del., 1959

Family: Wife, Kathy; children: Jake, Kaitlyn, Stephanie

College: University of Denver, BS, Business Administration with double major in Finance & Marketing

First job outside of finance: Sold hot cocoa for Carnation Corp.

First job in finance or allied field: Securities industry for Paine Webber

What do you do now and what are you planning for the future? I specialize in investment management for the individual and corporation and retirement plans. My philosophy is based on adhering to a long term strategy.

Hobbies: Certified lacrosse referee and coach, boating

Favorite book: Anything by Nelson DeMille, esp. "The Lions Game"

Person you admire most (outside of family): Jack Lebel (former president of Mass. Board of Realtors)

Key to success: Listen to your clients

If you had to choose another vocation what would it be? Lacrosse coach

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