



COCONUT GROVE FINANCIAL SERVICES

Coconut Grove Financial Services Welcomes Gerardo Rodriguez as Vice President and Infinex Investment Consultant



MIAMI, FL. February 1, 2015 – Gerardo “Jerry” Rodriguez, an experienced banking professional joins Coconut Grove Financial Services as Vice President and Infinex Investment Consultant.

As Vice President and Infinex Investment Consultant for Coconut Grove Financial Services, Jerry will be responsible for prospecting new business and managing investment portfolios for high-net worth clients and families.

Jerry specializes in investment and retirement planning; helping his clients achieve and maintain their desired investment goals based on a custom tailored investment strategy.

“Jerry has experienced much success cultivating new business and expanding client relationships by developing custom investment solutions to meet each client’s unique financial objectives,” said Michael Cabanas, Executive Vice President and Head of Wealth Management, Coconut Grove Bank.

Jerry has over 15 years of experience in the financial services industry and previously worked at Espirito Santo Financial Services, Banco Santander International, BankBoston International, EFG Capital International, and UBS International. Jerry received a Masters of Business Administration from Florida International University and Bachelor of Arts in Business Administration with a concentration in Finance from Florida International University. Jerry holds the following investment registrations and insurance licenses: Series 7, Series 24, Series 53, Series 63, and Series 65.

About Coconut Grove Financial Services

Investment, insurance products and services are offered through Infinex Investments, Inc., Member FINRA/SIPC. Coconut Grove Financial Services is a trade name of Coconut Grove Bank. Infinex and Coconut Grove Bank are not affiliated. Products and services made available through INFINEX FINANCIAL GROUP: are not a deposit, not insured by any government agency, not FDIC insured, not guaranteed by the bank, and may go down in value.

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