

# *Plimoth Investment Advisors*<sup>®</sup>

Investment Management & Trust Services

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As a Retirement Plan Officer with Plimoth Investment Advisors, Lucia is responsible for business development with respect to all types of retirement plans including 401(k), pension, profit sharing, non-qualified plans and IRAs. She manages the ongoing administration of employee benefit accounts, providing her customers with superior customer service. She also assists employers when new plans are established and on an ongoing basis by conducting employee educational meetings.

Prior to joining Plimoth Investment Advisors, Lucia served as an Assistant Treasurer and Branch Manager at BayCoast Bank. She has also held Manager and Assistant Manager positions at People's Credit Union and First Federal Savings Bank. Lucia brings nearly 30 years of experience in the financial industry to her position at Plimoth Investment Advisors.

Lucia earned her Associated Degree from the Community College of Rhode Island and a Bachelor's Degree in Business Administration at the University of Massachusetts at Dartmouth. A 2012 graduate of the New England School of Financial Services, she is currently working towards a QKA 401(k) Administrator credential, which will enable her to better assist employers and consultants with the recordkeeping, non-discrimination testing and administration aspects of 401(k) and other related defined-contribution plans.

A Fall River resident, Lucia has strong ties to the SouthCoast region. She is a member of the Money Management Program Advisory Council at Coastline Elderly Services, Inc. , which works to improve the quality of life for seniors by assisting them to remain independent. Lucia serves as treasurer for Mercy Meals and More, a non-profit program that provides a nutritious beginning to the day for neighbors in need. She also spends time each week mentoring a child through SMILES, the SouthCoast Mentoring Initiative for Learning, Education and Service.

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