INVESTMENT AND PLANNING

PLAN FOR YOUR FINANCIAL FUTURE WITH CEFCU®.

When you're making important financial decisions about your future, you want sound, objective advice from people you know, at a financial institution you trust. As a CEFCU member, you have access to a team of professionals who follow the same standards that guide your credit union — looking out for you and your best interests.

OUR SERVICES

Financial Representatives through CEFCU Investment Services and Wealth Management can help you plan for your future with a wide range of services.

Retirement Planning

- Income planning
- Retirement plan rollovers
- Individual Retirement Accounts (IRAs)
  - Rollover IRAs
  - Roth IRAs
  - Spousal IRAs
  - Traditional IRAs
- Business retirement accounts

Investment Services

- Investment planning
- Asset management
- Retirement plans
- Tax-advantage investing*
- Mutual funds & Annuities

Insurance Services

- Life
- Long-term care
- Disability

Education Planning and Funding

- Planning assistance
- Education savings accounts
  - Coverdell Education Savings Accounts (CESAs)
  - 529 savings plans
  - Roth IRAs

*Representatives are not tax advisors. For information regarding your specific tax situation, please consult a tax professional.

There has never been a better time to plan for your financial future.
Call 1.800.356.7865, ext. 32571 today.

UNBIASED PROFESSIONAL ASSISTANCE

At CEFCU Investment Services and Wealth Management, our primary objective has been, and will always be, to provide clients with the right programs, most current information, and best service possible.

Our experienced Representatives offer personalized, objective advice because they work on salaries, not commissions, so they always have your best interest at heart.

There's never been a better time to review your financial goals and plans. Visit cefcu.com or call 1.800.356.7865, ext. 32571 today to schedule a no-cost, no-obligation appointment.

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CEFCU Investment Services & Wealth Management is a marketing name used by CEFCU. Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. CBSI is under contract with the financial institution to make securities available to members. Trust services available through MEMBERS Trust Company, a federal thrift regulated by the Office of the Comptroller of the Currency. **Not NCUA/NCUSIF/FDIC insured, May Lose Value, No Financial Institution Guarantee. Not a deposit of any financial institution.**
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CEFCU®

Investment Services & Wealth Management

CEFCU Wealth Management

The CEFCU Wealth Management team understands the complex needs of members with more sophisticated needs like you, and continually looks for ways to manage your long-term financial results by giving you access to a full range of wealth management services.

The CEFCU Wealth Management team can help you plan for your future with services like:

- Comprehensive financial planning
- Trust & fiduciary services
- Wealth protection and transfer
- Business succession

Plus, with the help of your Private Member Group team, you can benefit from:

- Personalized and responsive attention.
- Expert financial advice and service to meet your specialized needs.
- Access to the top financial professionals for investing, personal lines of credit, jumbo or specialized mortgages, construction financing, and much more.

To schedule a no-cost, no-obligation appointment today, call 1.800.633.7077, ext. 33836.

cefcu.com