



## **Bret Edensword**

Financial Advisor, LPL Financial

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### **Personal Investment Guidance**

- **Retirement Planning**
- **Investment Management**
- **Fiduciary Advisory Accounts**
- **IRA Strategic Planning**  
(including Roth and Traditional)
- **Insurance Planning**  
(Long-Term Care, Life and Disability)
- **Education Planning**
- **Income Generation**
- **Wealth Preservation**

As your investment partner, we are committed to helping you work toward your personal financial goals and objectives. After developing a thorough understanding of your specific short-term and long-term goals and risk tolerance, we will work together to create a customized plan. Count on us to help you follow a disciplined process designed with a goal to help you accumulate, preserve and transfer your wealth.

### **Experience**

Bret joined BECU Investment Services in 2018. He brings 30 years of financial and insurance service experience to diligently understand his client's financial desires.

He believes short, intermediate, and long-range planning is the cornerstone of a comprehensive financial plan.

He carefully analyzes each client's holdings with the goal to help them have a paycheck in retirement, just like working years.

Bret's special focus is on Long-Term Care (LTC) and its effects on families, those in care, and caregivers.

He holds Series 7 and 66 securities registrations with LPL Financial, as well as Washington State Life, Disability, Long-Term Care licenses.

He graduated from Pacific Lutheran University. He and his wife Jeanine reside in Tacoma.

**Schedule a complimentary, no-obligation review today: Visit [becu.org/investments](http://becu.org/investments) or call 206-439-5720.**

*"Regardless of your financial goals for growth, income or preparing for the unexpected, I will give you transparent, useful advice to pursue your dreams."*

— Bret Edensword

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