BECU INVESTMENT SERVICES

Jaime Suárez

Wealth Advisor, LPL Financial

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PERSONAL INVESTMENT ADVICE

- Tax Strategy Planning
- Investment Management
- Private Product Options for Accredited Investors
- Retirement Planning
- Estate Planning
- Multigeneration Inheritance Planning
- Coordination with CPA and Estate Attorney
- Risk Review

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.

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Experience

Jaime Suárez is a dedicated investment professional who has served as an advisor with BECU Investment Services for almost two decades. With a strong emphasis on collaboration and building relationships with his clients, he has become a valued advisor in the financial industry.

Jaime's expertise in retirement planning, tax strategies, and wealth preservation, matched with his dedication to his client's success, makes him a valuable resource for individuals seeking alternative perspectives on their financial plan and goals.

He is devoted to examining clients' overall finances and developing a comprehensive, multigenerational wealth management plan based on their needs, values, goals and aspirations.

He holds series 7 and 66 registrations with LPL Financial, and is licensed in insurance strategies, furthering his ability to provide comprehensive solutions for more complex financial situations. He also provides an in-depth understanding of various financial benefits offered by employers such as Boeing, Amazon and Microsoft.

Schedule a Complimentary, No-Obligation Portfolio Review.

Visit **becu.org/investments** or **call 206-439-5720**

More info on the back. »