BECU INVESTMENT SERVICES

Jared B. Eglington, MBA, AIF®

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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

Jared provides experience, intellectual capital and dedicated personal service to help clients work toward their life goals.

Jared has spent over 18 years dedicated to providing clients an individually tailored approach. At the heart of his philosophy is a passion to provide outstanding guidance, value and service, whether one is just starting out or investing for a long time. He enjoys taking investment management beyond traditional methods, employing additional strategies that address each credit union member's unique needs.

Jared graduated with an MBA in finance from NYIT. He graduated with a BA in interdisciplinary studies from the University of Washington. Jared is an Accredited Investment Fiduciary (AIF®), holds series 7, 6, 65, and 63 licenses with LPL Financial. He is also licensed to provide Life and Disability insurance.

Schedule a complimentary, no-obligation review today: Visit becu.org/investments or call 206-439-5720.

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