



Jeff Lavezzi

Financial Advisor, LPL Financial

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PERSONAL INVESTMENT ADVICE

- 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.

INVE0324

Experience

Jeff has lived in the Seattle area for many years and brings more than 30 years of experience specializing in wealth management strategies, including retirement planning, tax-advantaged investments, 401(k) and Boeing 401(k) distribution planning services.

He is passionate about helping credit union members manage their financial future, and takes a personal interest in his clients' needs, tailoring an investment strategy appropriate to each credit union member's risk profile.

He holds Series 7, 63 and 65 securities registrations with LPL Financial, as well as Washington State Life and Disability Insurance licenses.

"A goal without a plan is just a wish."

— Antoine de Saint-Exupéry

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »

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