



Baron Kuhn

Financial Advisor, LPL Financial

206-702-9776 | baron.kuhn@becu.org

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.

Experience

Baron has been a financial advisor since 2016. He enjoys helping BECU credit union members better understand investing, retirement and more.

His "Members First" approach helps him figure out the specific needs of each BECU credit union member and tailor a strategy to meet their financial goals.

He holds the Series 7 and 66 registrations through LPL Financial as well as Washington State Life and Disability insurance licenses. His areas of expertise include long-term investing, retirement planning and college planning.

Baron studied economics and political science at the University of Washington and graduated from Charles Wright Academy in Tacoma.

Schedule a complimentary, no-obligation portfolio review.

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

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer, (member [FINRA](#)/[SIPC](#)). Insurance products are offered through LPL or its licensed affiliates. BECU and BECU Investment Services **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using BECU Investment Services, and may also be employees of BECU. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, BECU or BECU Investment Services. Securities and insurance offered through LPL or its affiliates are:

Not Insured by NCUA or Any Other Government Agency	Not Credit Union Guaranteed	Not Credit Union Deposits or Obligations	May Lose Value
---	------------------------------------	---	-----------------------

Your Credit Union ("Financial Institution") provides referrals to financial professionals of LPL Financial LLC ("LPL") pursuant to an agreement that allows LPL to pay the Financial Institution for these referrals. This creates an incentive for the Financial Institution to make these referrals, resulting in a conflict of interest. The Financial Institution is not a current client of LPL for brokerage or advisory services.

Please visit <https://www.lpl.com/disclosures/is-lpl-relationship-disclosure.html> for more detailed information.

Visit <http://www.lpl.com/CRS> for more information on the LPL Financial LLC relationship summary.

BECU Investment Services Corporate Office is located at BECU, 12770 Gateway Dr., Tukwila, WA 98168.
LPL Tracking# 751227