

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.

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 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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