BECU INVESTMENT SERVICES

Brian G. Locke

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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.

INVE1124

Experience

Since 1992, Brian has helped clients tailor their investment portfolios to be consistent with their long-term retirement goals. Striving to provide consistent high quality investment advice is the standard for which there is no compromise.

Brian understands that BECU credit union members have unique financial goals and objectives, and he works hard to carefully construct personalized financial plans.

His focus areas include fixed income strategies specializing in tax-free municipal bond investing, retirement planning, 401(k) and Boeing 401(k) Plan distribution services.

He was born and raised in the Seattle area and has numerous family and friends employed at Boeing.

Brian earned a bachelor's degree in political science from the University of Washington. He holds Series 7, 8, 24, 63 and 65 securities licenses with LPL Financial and Washington state Life & Disability insurance license.

"It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you'll do things differently."

— Warren Buffett

Schedule a complimentary, no-obligation portfolio review.

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

More info on the back. »