BECU INVESTMENT SERVICES

Jared Eglington, MBA, CFP®, AIF®

Financial Advisor, LPL Financial

206-805-5543 | jared.eglington@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.

INVE1124

Experience

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

Jared has spent over 20 years dedicated to providing clients an individually tailored approach. At the heart of his philosophy is a passion for providing outstanding guidance, value and service.

He enjoys taking investment management beyond traditional methods and employing additional strategies that address each credit union member's unique needs.

Jared graduated with an MBA in finance from the New York Institute of Technology. He graduated with a BA in interdisciplinary studies from the University of Washington.

Jared is a CERTIFIED FINANCIAL PLANNER® professional, Accredited Investment Fiduciary (AIF®) and he 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 portfolio review.

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

More info on the back. »