BECU INVESTMENT SERVICES

Jeremy Barrette

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.

INVE0625

Experience

Jeremy is a U.S. military veteran, proud dad and financial advisor dedicated to empowering BECU credit union members, their families and fellow service members to build a confident financial future. His thoughtful and client-focused approach prioritizes clear communication, transparency and tailored long-term strategies.

Jeremy specializes in partnering with clients across all life stages —from active-duty military and transitioning veterans to young investors and those navigating retirement. He provides personalized guidance in areas such as wealth accumulation, family financial protection and prioritizing financial goals, ensuring you feel confident at every step.

He holds the Series 7 and 66 securities registrations with LPL Financial and is licensed in Washington State for Life and Disability Insurance. After completing his military service, he attended Western Washington University, where he earned his B.A. in Business Administration with a finance concentration while balancing work, family and school.

"History never repeats itself; man always does."
— Voltaire

Schedule a complimentary, no-obligation portfolio review.

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

More info on the back. »