Kyle Max

Financial Advisor, LPL Financial

206-812-5318 | kyle.max@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.

INVE1024

Experience

Kyle specializes in retirement income planning, investment management and tax-efficient investing strategies. Born and raised in Mountlake Terrace, he's worked at BECU since 2007. He focuses on making sure your hard-earned assets are working for you to help you toward your financial goals.

Kyle understands each person has their own unique circumstances — and one person's risk tolerance and financial planning needs can be drastically different than another's.

To clearly understand your financial situation, he uses an easygoing communication style to get to know you personally and build a relationship. Once he understands your situation, he can build a customized — and tax-efficient — investment strategy suitable for you.

He holds Series 7 and 66 securities registrations through LPL Financial, as well as Washington State Life and Disability Insurance licenses.

> *"It's better to look ahead and prepare than to look back and regret."*
>
> *— Jackie Joyner-Kersee*

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »