Lance K. Nekota

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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

With more than 20 years of experience in financial services, Lance has a broad depth of expertise in investment and retirement planning, which enables him to provide fully integrated retirement strategies.

Lance takes a holistic approach to investing through a conscientious process of gaining a complete understanding of his client's goals, lifestyle and risk tolerance. By building long-term relationships, he is able to assist his clients with well defined goals and a strategic roadmap to work toward them.

Lance holds a Bachelor's of Business Administration degree in Marketing and International Business from the University of Hawaii. He also holds a J.D. from Syracuse University. He also holds Series 7, 63, and 65 securities registrations with LPL Financial and Washington state licenses in Life and Disability insurance.

"If you don't know where you are going, you'll end up someplace else."

— Yogi Berra

Schedule a complimentary, no-obligation portfolio review.

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

More info on the back. »