



Lance K. Nekota

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.

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. »

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