



## Lonnie Lee

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.

### Experience

Lonnie Lee is a Financial Advisor at BECU Investment Services, driven by a deep passion for empowering individuals to achieve financial independence, health and ultimately, wealth. She believes that financial well-being is essential to living a fulfilling life and is committed to helping BECU credit union members work toward their goals with clarity and confidence.

Since entering the financial services industry, Lonnie has brought a thoughtful, client-first approach to every interaction. Before joining BECU Investment Services, Lonnie built her knowledge at respected institutions such as TIAA and Wells Fargo, where she earned a reputation for building valued relationships through clear communication and tailored guidance.

Outside of work, Lonnie enjoys exploring the Pacific Northwest, crafting, and leading community workshops that promote sustainable, zero-waste living.

She holds FINRA Series 7 and 66 licenses through LPL Financial and specializes in working with newer investors and individuals preparing for retirement, guiding them through their financial journeys with personalized strategies and education.

**Schedule a complimentary, no-obligation portfolio review.**

Visit [becu.org/investments](https://becu.org/investments) or call **206-439-5720**.

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