BECU INVESTMENT SERVICES

Lorilee P. Wells

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.

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Experience

Lorilee brings more than 20 years in the investment industry and over 30 years of insurance service experience to create comprehensive financial plans for BECU credit union members.

She specializes in retirement income planning, investment management, business retirement programs, fixed income, insurance and risk mitigation strategies, 401(k) distribution services, Boeing 401(k) Plans and 403(b) accounts.

Lorilee can also provide small business strategies for employee retirement packages, including SEP IRAs, Simple IRAs and 401(k) plans. She holds Series 7 and 66 securities registrations through LPL Financial as well as Washington state Life and Disability insurance licenses.

Lorilee has been a loyal BECU member for more than 35 years, and has a personal understanding of the BECU culture and credit union member interests.

> *"Rowing harder doesn't help if the boat is headed in the wrong direction."*
>
> *— Kenichi Ohmae*

Schedule a complimentary, no-obligation portfolio review.

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

More info on the back. »