Maggie Dolan, CFP®

Financial Advisor, LPL Financial

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BECU INVESTMENT SERVICES

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.

INVE1224

Experience

Maggie joined BECU Investment Services in 2017 and is a CERTIFIED FINANCIAL PLANNER® professional.

Her priority is to offer valuable, honest advice for credit union members, tailored to the unique needs of their financial picture. She is committed to building long-term relationships so credit union members feel empowered and supported each step of their financial journey.

She specializes in retirement planning, 401(k) distribution planning, Traditional and Roth IRAs and education.

Maggie earned her bachelor's degree in business administration from Clarke University in Dubuque, Iowa. She holds Series 7 & 66 registrations with LPL Financial and Washington State Life and Disability Insurance.

She is an Iowa native and strives to be a reflection of the Midwest values instilled in her.

"What happened to you can be your greatest strength."
— Oprah Winfrey

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »