Mark Kinney

Financial Advisor, LPL Financial

509-321-2789 | mark.kinney@becu.org

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

Mark believes listening is the most important part of his job. His first priority is to fully understand his clients' goals so he can help build a personalized financial plan.

Mark truly enjoys getting to know his clients and strives to provide exceptional guidance, service and value. He specializes in retirement planning, long-term investment management and income generation in retirement.

Mark holds Series 7, 6, 65, and 63 securities registrations with LPL Financial and is licensed to provide Life and Disability insurance.

Mark is a U.S. Air Force veteran. He has an undergraduate degree from South Dakota State University and a graduate degree from Whitworth University. He resides in Spokane Valley, WA.

> *"A goal without a plan is just a wish."*
> *— Antoine de Saint-Exupéry*

Schedule a complimentary, no-obligation portfolio review.

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

More info on the back. »

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer, (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. BECU and BECU Investment Services **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using BECU Investment Services, and may also be employees of BECU. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, BECU or BECU Investment Services. Securities and insurance offered through LPL or its affiliates are:

Not Insured by NCUA or Any Other Government Agency	Not Credit Union Guaranteed	Not Credit Union Deposits or Obligations	May Lose Value

Your Credit Union ("Financial Institution") provides referrals to financial professionals of LPL Financial LLC ("LPL") pursuant to an agreement that allows LPL to pay the Financial Institution for these referrals. This creates an incentive for the Financial Institution to make these referrals, resulting in a conflict of interest. The Financial Institution is not a current client of LPL for brokerage or advisory services.

Please visit **https://www.lpl.com/disclosures/is-lpl-relationship-disclosure.html** for more detailed information.

Visit **http://www.lpl.com/CRS** for more information on the LPL Financial LLC relationship summary.

BECU Investment Services Corporate Office is located at BECU, 12770 Gateway Dr., Tukwila, WA 98168.
LPL Tracking# 751322