



Mark Kinney

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

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**.

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