BECU INVESTMENT SERVICES

Matt Wahlman

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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

Matt has been in the investment management industry for over 22 years. He uses a personalized approach to build relationships and tailor wealth management strategies for his clients.

He believes a broadly balanced investment portfolio should provide a comprehensive and consistent way to pursue strong risk-adjusted returns over the long term. He specializes in retirement planning with a focus on fixed-income strategies and 401(k), Boeing 401(k) Plans and 403(b) distribution services.

Matt earned a bachelor's degree in business administration at Seattle University with a concentration in finance and a minor in economics.

He holds Series 7, 63 and 65 securities registrations with LPL Financial, as well as Washington state Life and Disability insurance licenses.

Schedule a complimentary, no-obligation portfolio review.

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

More info on the back. »