



Matt Wahlman

Financial Advisor, LPL Financial

206-812-5238 | matt.wahlman@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.

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**.

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