BECU INVESTMENT SERVICES

Mike Rackner

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.

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Experience

With over 25 years of industry experience, Mike is highly skilled in developing and executing goal-based planning strategies to help build a strong financial foundation.

As an expert in investment management and wealth consulting, Mike tailors portfolios to align with individual risk tolerance and financial goals. He leverages his deep knowledge of 401(k), 403(b), and Boeing retirement options to create robust investment strategies. He also specializes in providing strategic guidance for retirement decisions. Whether you are looking to optimize Social Security benefits, create a withdrawal strategy, or plan for post-retirement income, Mike is committed to helping BECU credit union members safeguard their wealth and become well prepared for their next chapter.

"Remember, retirement planning is like having two six-month holidays each year—a perspective that I encourage clients to embrace. Start planning today to make every day feel like a Friday! "

— Mike Rackner

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »