Rick Nelson

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

Rick has been with BECU Investment Services for over six years and brings more than 30 years of experience as a financial advisor. Over the course of his career, he has developed a deep understanding of retirement income planning and investment management. He is passionate about helping clients work toward a financially secure and comfortable retirement, tailoring strategies to address their unique needs and goals. His approach emphasizes clear communication and building strong, lasting relationships.

Rick grew up in Spokane, Washington, and earned degrees in finance and radio/television from the University of Idaho. A proud Vandal, he brings leadership and dedication to his work with clients. He holds Series 7, 63, and 65 securities registrations through LPL Financial, as well as Washington state Life and Disability insurance licenses.

Outside of work, Rick enjoys a variety of sports, including basketball, golf, ping pong, football, baseball and bowling, and occasionally a good game of blackjack. He also values spending quality time with his wife, Leslie, and his four granddaughters.

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »