



## Ron Gubelman

Financial Advisor, LPL Financial

206-805-5625 | [ron.gubelman@becu.org](mailto:ron.gubelman@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

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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

Ron brings over 23 years of experience helping credit union members plan for retirement, manage investments and pursue long-term financial goals. He specializes in tax-efficient strategies, retirement income planning and employer-sponsored account distribution. Ron is licensed in securities and insurance and is passionate about building lasting relationships that support credit union members' financial well-being.

Originally from Plainfield, New Jersey, Ron moved to Washington to attend Whitman College. Outside of work, he enjoys golfing, staying active and spending time with family and friends.

Ron holds Series 7 and 66 registrations with LPL Financial, and Washington State Life & Disability Insurance licenses.

*"Someone's sitting in the shade today because someone planted a tree a long time ago."*

— Warren Buffett

**Schedule a complimentary, no-obligation portfolio review.**

Visit [becu.org/investments](https://becu.org/investments) or call **206-439-5720**.

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