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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BECU INVESTMENT SERVICES

Sean Jones

Financial Advisor, LPL Financial

360-255-2123 | sean.jones@becu.org

Experience

Born and raised in Huntington Beach, California, Sean earned his education at Orange Coast College and University of California, Berkeley Extension. Today, he brings nearly 20 years of experience to families and individuals across Washington, helping them work toward financial independence and their personal goals.

Sean specializes in retirement income planning with a focus on strategies designed to help preserve clients' hard-earned principal while seeking growth potential. He is particularly passionate about helping parents and family members of people with developmental disabilities navigate asset preservation and planning for the future. His approach centers on creating comprehensive financial strategies tailored to each client's unique situation.

He holds Washington state Life and Disability insurance licenses as well as the Series 7, 63 and 66 licenses with LPL Financial. Outside of work, Sean is an avid sailboat racer and licensed captain, scuba diver, a general aviation enthusiast, a special needs advocate and a member of the U.S. Coast Guard Auxiliary.

> *Be courteous to all, but intimate with few, and let those few be well tried before you give them your confidence — true friendship is a plant of slow growth, and must undergo and withstand the shocks of adversity before it is entitled to the appellation."*
>
> *— George Washington*

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »