



## Sergio Garza, CRPC®

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.

### Experience

Born and raised in Texas, Sergio earned his bachelor's degree in Business Economics from the University of Texas at Austin. Today, he brings more than 25 years of experience to families and individuals across Washington, helping them pursue financial independence and the confidence to live life on their own terms.

Sergio partners with clients on all aspects of their financial journey — from retirement planning and investment strategies to broader goals that align with their values and vision. His work often includes strategies to help reduce tax burdens, choosing the right type of IRA, or navigating major life transitions such as the loss of a spouse or partner, divorce, or the inheritance of new assets.

He holds a Washington state Life and Disability insurance license as well as the Series 6, 7, 9, 10, 63, and 66 licenses with LPL Financial. He also holds the Chartered Retirement Planning Counselor<sup>SM</sup> (CRPC®) designation — a reflection of his commitment to guiding clients with both knowledge and care.

*"Our job is not to predict the rain, but  
to help clients build the ark."*

— Unknown

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

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

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