Steve Vertrees

Wealth Advisor, LPL Financial

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BECU INVESTMENT SERVICES

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.

INVE1224

Experience

Steve uses his knowledge and experience to help BECU credit union members pursue financial independence. His goal is to simplify the retirement process for his clients. Every client becomes part of Steve's financial family.

Steve enjoys helping investors develop their investment vision. Once the vision is known, the next steps fall into place. He also specializes in 401(k), 403(b), the Boeing 401(k) Plan and Executive Compensation Programs. Clients rely on Steve for his talent articulating investment objectives to help them pursue financial independence.

Steve earned a bachelor's degree in finance from Seattle University with an emphasis in philosophy, economics and psychology.

"I am committed to helping my clients analyze every crossroad in life that may influence an investment decision. As their valued wealth advisor, I will refine my clients' investment strategies every `step of the way to suit their goals."

— Steve Vertrees

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »