BECU INVESTMENT SERVICES

PERSONAL INVESTMENT ADVICE

- Retirement Planning
- Investment Management
- Fiduciary Advisory Accounts
- IRA Strategic Planning (including Roth and Traditional)
- Insurance Planning
- 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.

INVE0324

Edward Bang, MBA, CRPC ®

Financial Advisor, LPL Financial

206-702-9802 | edward.bang@becu.org

Experience

Eddie's professional background and experience taught him the listening skills to help his clients by understanding their most important financial goals and implementing a plan toward achieving them. He is passionate about helping credit union members with their planning needs, no matter what stage of life they are in.

His specialties include retirement planning, 401(k) distribution planning, traditional and Roth IRAs, and long-term investment management.

Eddie holds the Series 7 and 66 securities registrations with LPL Financial as well as the Washington State Life and Disability Insurance License. Additionally, he has the Chartered Retirement Planning Counselor (CRPC®) designation. He graduated with an MBA from Pacific Lutheran University, and a bachelor of arts in history from the University of Washington.

"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** or **call 206-439-5720**

More info on the back. »