



**Kyle Max**

Financial Advisor, LPL Financial

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**Personal Investment Guidance**

- 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, protect and transfer your wealth.

**Experience**

Kyle is passionate about pairing financial planning with the value, service and trust credit union members expect from BECU. Kyle uses time-tested investment strategies to assist with long-term investment management and financial planning. His focus is to help BECU members navigate career changes, retirement planning and more.

His areas of service include risk management, asset placement, retirement planning, investment management, and retirement plan distribution planning for 401(k), Boeing 401(k) Plan and 403(b).

He is experienced in Roth and Traditional IRAs, fiduciary portfolio management, generating sustainable income, annuities and more.

He holds Series 7 and 66 securities registrations through LPL Financial, as well as Washington State Life and Disability Insurance licenses.

**Schedule a Complimentary, No Obligation Portfolio Review**

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

*"Investing should be dull. It shouldn't be exciting. Investing should be more like watching paint dry or grass grow."*  
~ Paul Samuelson

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Not Insured by NCUA or Any Other Government Agency	Not Credit Union Guaranteed	Not Credit Union Deposits or Obligations	May Lose Value
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BECU Investment Services Corporate Office located at BECU, 12770 Gateway Dr., Tukwila, WA 98168