BECU INVESTMENT SERVICES

Steve Vertrees

Wealth 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**
- **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

Steve is a Seattle native and a member of a family with strong links to The Boeing Company. He uses his experience and financial management to help BECU members work toward their financial goals and dreams. His goal is to simplify the retirement process for his clients.

Steve enjoys helping investors develop wealth accumulation, asset optimization and investment strategies. He also specializes in 401(k), 403(b), the Boeing 401(k) Plan and employee stock option planning. Clients rely on Steve for his talent articulating investment objectives to help them pursue financial independance.

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

Schedule a complimentary, no-obligation portfolio review today:

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

"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 lives and goals."
— Steve Vertrees

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