B|E|C|U INVESTMENT SERVICES

Todd J. Baek

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.

INVE0824

Experience

Todd has over 20 years of experience in the financial services industry, specializing in wealth planning strategies, including tax-advantaged investment strategies, retirement planning, 401(k) and Boeing 401(k) distribution services. Todd also focuses on evaluating family needs in insurance, income and wealth preservation.

Todd and his family have been in the Seattle area for many years. He personally enjoys assisting clients to create customized investment portfolios in order to pursue their financial goals and objectives. Being in the business since 1998, his overall objective is to continually work with his clients' changing financial environment, providing advice that is in the best interest of the client.

Todd graduated from the University of Washington with a bachelor of arts degree in economics with an emphasis in finance. He holds Series 7, 63, and 65 registrations with LPL Financial, as well as Washington State Life and Disability Insurance licenses.

"An investment in knowledge pays the best interest."
— Benjamin Franklin

Schedule a Complimentary, No-Obligation Portfolio Review.

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

More info on the back. »