



TOGETHER, WE CAN HELP YOU PURSUE YOUR FINANCIAL GOALS

- Planning • Investing • Income

Service from people you know - everything you need to pursue your dreams. Our experienced professionals can help you:

- Save and invest for retirement and education
- Accumulate assets for the future
- Create a safety net by evaluating your insurance protection needs
- Learn to manage and preserve your wealth
- Create a retirement income stream
- Create a financial plan for retirement
- Plan your legacy through gifting, wealth transfer strategies and Trust accounts*

Financial Plans and Wealth Management

Financial plans that provide comprehensive analysis and planning for financial goals, retirement and estate transfer. From today through retirement. As a benefit to Service CU members, experienced Service Financial Group professionals are here to assist you in planning for life's expected and unexpected events.

Insurance Services

Planning assistance to help you determine if you have the right amount and type of life insurance to meet your needs.

- Term Life Insurance
- Permanent or Cash Value Insurance
- Disability Insurance Buy/Sell Agreements
- Long Term Care Insurance

*LPL Financial Representatives offer access to Trust Services through The Private Trust Company N.A., an affiliate of LPL Financial.

Service Credit Union provides referrals to financial professionals of LPL Financial LLC ("LPL") pursuant to an agreement that allows LPL to pay the Service Credit Union for these referrals. This creates an incentive for Service Credit Union to make these referrals, resulting in a conflict of interest. Service Credit Union is not a current client of LPL for advisory services. Please visit <https://www.lpl.com/disclosures/is-lpl-relationship-disclosure.html> for more detailed information

Securities offered through LPL Financial (LPL), a registered broker-dealer, member FINRA/SIPC. Investment advisor Representatives conducting business as Service Financial group offer investment advisory services through LPL, a registered investment advisor. Insurance products are offered through LPL or its licensed affiliates. Service Credit Union and Service Financial Group **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using Service Financial Group, and may also be employees of Service Credit Union. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Service Credit Union or Service Financial Group. Securities and insurance offered through LPL or its affiliates are:

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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Meet with a Service Financial Group advisor at your local Service CU branch or virtually.

Contact Us Today:

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Retirement Services

Planning assistance, whether you're just getting started, ready to retire or retired now.

- Retirement plan distribution options
- IRA to IRA Transfers
- Traditional and ROTH IRA Accounts
- Spousal and Inherited IRAs
- Small Business Retirement Accounts
- SIMPLE IRAs, SEP IRAs
- Financial Planning

Education Services

Planning assistance to help you save for your children or grandchildren's anticipated educational needs.

- 529 College Savings Plan Accounts
- Uniform Transfer to Minor Accounts

servicecu.org/invest