



## **Investments, Insurance, and Financial Planning**

When it comes to planning for your future and dealing with everything from college planning, retirement planning, or even estate strategies, it can help to have someone who's experienced and knowledgeable to assist you along the way. The Member Wealth Management team works closely with our members to provide them with strategies that help with their unique situations.

### **Member Wealth Management services include:**

- Retirement and income strategies
- Investment analysis and portfolio allocation
- Wealth transfer and estate planning strategies

### **Investment services include:**

- Mutual funds
- Fixed and Variable annuities
- Traditional and Roth IRA's
- 529 plans (college savings plans)
- Individual stocks and bonds
- 401 (k) and other retirement plans

### **Insurance services include:**

- Life Insurance
- Disability Income Insurance
- Long Term Care Insurance

For more information about Member Wealth Management, please call Shavon Roman today at (770) 353-0486 or email her at [sroman@financialguide.com](mailto:sroman@financialguide.com). Additional information regarding Member Wealth Management is also available at [www.memberwealthmanagement.com](http://www.memberwealthmanagement.com).

Products and Services are: NOT A CREDIT UNION DEPOSIT; NOT NCUA INSURED; NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY; NOT GUARANTEED BY THE CREDIT UNION; MAY GO DOWN IN VALUE

Securities, Investment Advisory and Financial Planning services offered through qualified registered representatives of MML Investor Services, LLC, **Member SIPC**: 222 Central Park Ave Suite 1100 Virginia Beach VA 23462 (757) 490-9041. Member Wealth Management and the Credit Unions are not a subsidiary or affiliate of MML Investor Services, LLC and affiliated companies.

**CRN201507-173977**