Service Financial Group

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*

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

Contact Us Today:
Rich Wallner CFP, CLU
richard.wallner@LPL.com
Tel: 603.430.6984

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

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 Program Accounts
- Uniform Transfer to Minor Accounts

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

servicecu.org/invest

0357 6.23