



**YOUR PARTNER  
FOR FINANCIAL  
WELLNESS**

**THANK YOU  
FOR  
INVITING US  
TO SPEAK**

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# FINANCIAL ADVISORY SERVICES



Insurance  
Services



Investment  
Services



Retirement  
Planning



Tax Preparation  
Services



Education  
Planning



Financial  
Empowerment



Estate Planning



Trust Services

\*Some services may be limited to NC residents only



# SECU Can Help You Financially Prepare for Every Life Stage

- Off to College or Beginning a Career
- Starting or Extending a Family
- Entering Retirement





**OFF TO  
COLLEGE  
OR  
BEGINNING  
A CAREER**

# OFF TO COLLEGE OR BEGINNING A CAREER



## Tax Preparation Services

Impact on college student or new worker

Impact on parents or guardians



## IRA and Investment Services

Financial Counseling

Saving for future goals



## Trust Services

Basic estate planning documents

Durable Power of Attorney

Health Care Power of Attorney and Advanced Directives

Will



## Insurance Services

Auto and Homeowners Insurance

Health and Life Insurance



**STARTING OR  
EXTENDING  
A FAMILY**

# STARTING OR EXTENDING A FAMILY



## Tax Preparation Services

Tax benefits

Tax withholding considerations



## IRA and Investment Services

Education Planning

Spending Plan



## Trust Services

Updates to Estate Planning documents

Guardianship considerations for minor children



## Insurance Services

Auto and Homeowners Insurance

Health and Life Insurance





# ENTERING RETIREMENT

# ENTERING RETIREMENT



## IRA and Investment Services

Social Security Strategies

Asset drawdown



## Tax Preparation Services

Retirement Income Tax Planning

Tax withholding considerations



## Trust Services

Updates to Estate Planning documents

Review Beneficiary Designations



## Insurance Services

Annuities

Health Insurance and Medicare

# THE SECU DIFFERENCE

SECU has local, licensed representatives (Trust, Investments, Insurance and Tax) who are full-time employees and receive no commission for the advice offered to members.



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## Financial Advisory Services

### We Can Help!

**Education Planning • Insurance  
Investments • Financial Empowerment  
Retirement Planning • Tax Preparation  
Trust Services and Estate Planning**

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