

# Westmark Investment Services

## Helping You Pursue Your Financial Goals

Whether you are new to investing or a seasoned investor, we can help you pursue your individual and unique financial goals. Our Investment Professionals are committed to listening to your needs, providing solutions to help you reach your goals, and delivering service excellence. Estate planning, wealth transfer, long term care, retirement income, and tax sheltering are among the many services we provide to our members.



## Understanding Your Goals

Our team of Investment Service Professionals can guide you through a series of questions that help clarify your current financial position, investment goals, and outlook. This evaluation also gives you a complete picture of your risk tolerance, time horizon, and cash flow needs. Working together, we will decide which financial solutions best suit your needs.

## We are here to help you:

- Plan for a comfortable retirement
- Develop a long-term investment strategy
- Protect your family's future with life insurance
- Build your financial portfolio
- Create flexible income strategies
- Professionally manage your assets

## Advisory Services

Asset management services provide you with a robust managed money solution for an asset-based quarterly fee. Designing your portfolio, developing and implementing your financial plan, and periodic reviews are a few of the concepts and services your advisor can provide.

## Our Firm

We work closely with our firm as a team to provide you with comprehensive and convenient service. In addition, the network of people and resources we have access to through our broker-dealer help you and us pursue your unique goals and vision for the future. The depth of their support, including areas such as wealth management solutions, technology, research, product due diligence and industry insight, help us make more informed decisions with you. While we have this level of support behind us, we always have the independence and freedom to recommend the financial solutions that best suit your needs, ensuring your objectives are what drive all decisions.



**Westmark**  
CREDIT UNION