

## Union Members Helping Union Members

### Who we are:

We offer businesses, individuals and institutional clients a wide range of financial products and services. Our Team consists of Financial Professionals who are also Local Union 193 members. Over the past 8 plus years, we have worked one on one incorporating your benefits with your individual retirement plan.

**“We strive to personalize your investment plan according to your comfort and risk level.”**

### Pre- Retirees:

- Retirement Planning- From Hire Date to Retire Date
- Work with members one on one to create their own investment and income plan
- Risk Management / Investment Strategies
- Asset Allocation/ Diversification; review your 401K
- Protect your retirement income
- Risk and Insurance Planning

### Near Retirement:

- Analyze your financial readiness for retirement
- How to incorporate your benefits into your retirement planning.
- Techniques to Maximize your Pension
- Survivor Income Protection

### After Retirement:

- Monitor your plan
- Review and adjust plan over time
- Planning is not a “set and forget it” strategy.

**Please contact us at (630) 874-6480**

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