

join us!



Retirement & Investment Center

virtual seminar

## The Three Transitions to Retirement | 6 pm Tuesday, February 27

### Learn about:

- Confidently addressing the financial, lifestyle and emotional transitions to retirement
- Guarding against risks and managing the inevitable
- Gauging when you're ready for retirement

**\*There is no cost or obligation to attend.**

### Presented by:

Travis Stanley RICP, CSS, NISSA, and CSS  
from CUNA Mutual Group



**to register,  
scan here!**

Learn more at: [www.service1.org/retirement-investment](http://www.service1.org/retirement-investment)

### For more information:

Contact Jeffrey H. McKinnon\*, CFP®, CRC®, LPL Financial Advisor, Service 1st Retirement & Investment Center at 800.562.6049 ext. 7596.

This workshop is educational only and is not investment advice. If you need advice regarding your financial goals and investment needs, contact a financial advisor. CUNA Mutual Group is the marketing name for CUNA Mutual Holding Company, a mutual insurance holding company, its subsidiaries and affiliates, these entities are not affiliated with LPL Financial. TruStage™ Annuities are issued by CMFG Life Insurance Company (CMFG Life) and MEMBERS Life Insurance Company (MEMBERS Life) and distributed by their affiliate, CUNA Brokerage Services, Inc., member FINRA/SIPC, a registered broker/dealer, 2000 Heritage Way, Waverly, IA, 50677. Investment and insurance products are not federally insured, may involve investment risk, may lose value and are not obligations of or guaranteed by any depository or lending institution. All contracts and forms may vary by state and may not be available in all states or through all broker/dealers.

CMGA-4751587.2-0923-1025

© TruStage

CRC conferred by InFRE®.

Travis Stanley and TruStage™ are not affiliated with or endorsed by LPL Financial and Service 1st Retirement & Investment Center.

**\*Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC).**

Insurance products are offered through LPL or its licensed affiliates. Service 1st Federal Credit Union and Service 1st Retirement and Investment Center **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using Service 1st Retirement and Investment Center, and may also be employees of Service 1st Federal Credit Union. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Service 1st Federal Credit Union or Service 1st Retirement and Investment Center. Securities and insurance offered through LPL or its affiliates are:

Not Insured by NCUA or Any Other Government Agency	Not Credit Union Guaranteed	Not Credit Union Deposits or Obligations	May Lose Value
--	-----------------------------	--	----------------

There is no assurance that the techniques and strategies discussed are suitable for all investors or will yield positive outcomes. The purchase of certain securities may be required to effect some of the strategies. Investing involves risk including possible loss of principal.