

# INVESTMENT SERVICES

through CUSO Financial Services, L.P.\*

## Building a plan for your financial future.



Life is filled with tough decisions regarding your financial future, especially when important events happen. When those big moments take place, it's a good idea to have a plan in place so you can navigate through life's surprises, curveballs, and joyful moments.

Your personal goals and dreams mean everything to us — that's why we've contracted with CUSO Financial Services, L.P. (CFS)\* to offer you the experience and resources you need, combined with the strategies and solutions to fit your life goals.

### Why choose Investment Services through CFS\*?

#### + Committed to your best interests.

We maintain a high quality standard of ethics, security, and transparency.

#### + Offering proactive support.

People make the difference. We work to help you move forward, offering new ideas and potential opportunities along the way.

#### + Tailored to your needs.

We take the time to learn what you need instead of fitting you into an existing box. The advisors work with you to craft flexible solutions that add above and beyond value.

#### + Providing seamless delivery.

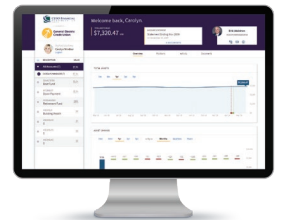
Our knowledge, experience, and technology help us consistently deliver high quality results.

#### + Providing industry knowledge.

You'll receive industry-related investment information each month, including market reviews and activity.

#### + View your accounts any time.

Wherever you are, you'll have convenient access to view your investment account information, including history, statements, and documents, all within Online Banking and our mobile app.



### We specialize in a variety of areas including:

- Retirement and Income Planning
- Financial Planning
- Social Security Preparation
- Wealth Management
- Long-Term Care Solutions
- Asset Allocation
- 401(k) and IRA Rollover Options
- College Planning
- Life Insurance
- Annuities
- Discount Brokerage Accounts
- Investing, and more



**General Electric  
Credit Union**

## Meet the CFS\* Financial Advisors



### Todd Blessing

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As a CFS\* Registered Representative, Todd assists members with asset management, college and retirement planning, estate planning strategies, and wealth preservation. He specializes in the design and implementation of strategies for personal wealth management. He is a graduate of Miami University and received the Gold Pacesetter Award from 2012-2016, which recognizes top revenue-producing CFS\* registered representatives. Todd has been in the Investment Business for 18 years with 10 years as an Investment Wholesaler and 8 years as a Registered Representative. Todd has Series 7, 63, and 65 licenses and is licensed to sell securities in the following states: AZ, CA, FL, GA, IL, IN, KY, MD, MI, MN, MS, MO, NC, NY, OH, SC, and VA.

Todd is located at our Reading Road office and is also available to meet at any location.



### Erik Waldron

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For many people, the number one concern they have when it comes to retirement is running out of money. Erik will work with you to create a comprehensive financial plan to help preserve your wealth, navigate common pitfalls, and ensure your success in retirement. With over 25 years of industry experience, he looks forward to developing an individualized plan to meet your retirement goals. Erik graduated from Ohio University with a bachelor's degree in finance. He currently has Series 7, 63, and 65 licenses. Erik is licensed to sell securities in the following states: FL, IL, IN, KY, and OH. He is licensed for Insurance in the states of OH, KY, and IN.

You can find Erik at our Mason and Loveland offices, and he is also available to meet at any location.

**Member eligibility required. Visit: [gecreditunion.org/membership](https://gecreditunion.org/membership) for details.**

\*Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a Registered Broker-dealer (Member FINRA/SIPC) and SEC-registered Investment Advisor. Products offered through CFS: **are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal.** Investment Representatives are registered through CFS. General Electric Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.

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Learn more at: [gecreditunion.org/investments](https://gecreditunion.org/investments)

or call us at: **513.243.4328/800.542.7093**