



**GEORGE K.  
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Check the background  
of this investment  
professional on  
FINRA's [BrokerCheck](#).

As a financial advisor, George brings 24 years of financial expertise to the table. George carefully listens to the members to fully understand their concerns. Whether it's planning to save for their child's college education, buying their first home, or saving for a secure retirement, George guides our members through every step of the financial planning process to create a personalized plan.

Once all of the necessary information is gathered, George then prepares a detailed financial plan based exclusively on the information provided by the member. The member then uses the newly developed financial plan as a road map and guide to help achieve their expressed personal and financial goals.

Periodic reviews are scheduled to evaluate and understand what progress the member has made on the road to achieving their desired goals. As necessary, updates and adjustments will be made to the plan.

As a trusted partner of Island Federal Credit Union, George has a strong history of working with Credit Union members, their families, and their friends. George has access to a wide variety of investment and insurance products. Specifically, we can make sure you have solid answers to these key questions:

- Is your retirement money invested properly?
- Will you have enough income in retirement?
- What should you do with an existing retirement plan from a previous employer?
- How will you pay for a child or grandchild's education?
- Financially, what would happen to your family if you died?
- How will you pay for long term care?

George is a Registered Representative of CUNA Brokerage Services, Inc.\*member FINRA/SIPC. George is also a licensed representative of CMFG Life Insurance Company.

It's easy to get started. Please contact George for a no-cost, no-obligation consultation.

Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member [FINRA/SIPC](#), a registered broker/dealer and investment advisor. CBSI is under contract with the financial institution to make securities available to members.

**Not NCUA/NCUSIF/FDIC insured, May Lose Value, No Financial Institution Guarantee. Not a deposit of any financial institution.**

CUNA Brokerage Services, Inc., is a registered broker/dealer in all fifty states of the United States of America.

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