



**Mike Rackner**

Financial Advisor, LPL Financial

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**Personal Investment Guidance**

- Retirement Planning
- Investment Management
- Fiduciary Advisory Accounts
- IRA Strategic Planning (including Roth and Traditional)
- Insurance Planning (Long Term Care, Life and Disability)
- Education Planning
- Income Generation
- Wealth Preservation

As your investment partner, we are committed to helping you work toward your personal financial goals and objectives. After developing a thorough understanding of your specific short-term and long-term goals and risk tolerance, we will work together to create a customized plan. Count on us to help you follow a disciplined process designed with a goal to help you accumulate, protect and transfer your wealth.

**Experience**

Mike is passionate about helping people preserve and grow individual and family wealth in a manner that aims to achieve personal and financial goals. He has extensive experience in developing and implementing a goals-based planning strategy to help BECU members build a strong financial foundation with 25 years of industry experience including over 19 years with BECU Investment Services. Mike provides guidance for strategic decisions regarding retirement, estate planning and investment management.

His specialties include building complimentary retirement plans for BECU members retiring in the next decade as well as wealth management.

Areas of focus include investment management and wealth consulting, family legacy planning, and mastery of 401(k), 403(b) and Boeing employee retirement options. Mike holds Series 7, 63,

and 65 securities registrations with LPL Financial. He also holds Washington State Life and Disability Insurance licenses.

Mike is a Seattle native and a graduate of the University of Washington. He enjoys gardening, hiking, traveling and UW Football with his wife, while his two daughters attended the University of Washington.

**Schedule a Complimentary, No Obligation Portfolio Review.**

**Visit [becu.org/investments](http://becu.org/investments) or call 206-439-5720.**

*"Think about retirement as being two six-month holidays per year. Now Fridays aren't the best day of the week anymore... they all are! A year from now, you may wish you have started planning today."*

— Karen Lamb

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Not Insured by NCUA or Any Other Government Agency	Not Credit Union Guaranteed	Not Credit Union Deposits or Obligations	May Lose Value
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BECU Investment Services Corporate Office located at BECU, 12770 Gateway Dr., Tukwila, WA 98168