

Kid's College Education
College tuition is said to be increasing at twice the rate of inflation. How do you prepare for this significant financial investment?

Estate Planning
With 700+ laws, it's worth to think about. What makes sense for your individual situation?

Family Insurance Protection
Life events such as marriage or divorce, the birth of a child, and employment status affect your insurance policies. Is your coverage sufficient?

Taxes
What is the difference between tax-free and tax-deferred and which one is right for you?

Retirement
Retirement years can be exciting, fun... and expensive.

Low Rates
Experienced financial consultants may be able to help find savings and potential investment opportunities in a down market.

Stock Market Crash
When the word "investment" could be a bad word.

FOR SALE

Don't Navigate Your Financial Future Alone
When life happens, making good financial decisions can be tough. Let Us Guide You through It...

Schedule your complimentary appointment today:
Phone: 877-254-9328, x5042
Email: Investments@Western.org

Western MEMBERS' FINANCIAL SERVICES

Securities and insurance products offered through LPL Financial and its affiliates. Member FINRA/SIPC.

Not NCUA Insured No Credit Union Guarantee May Lose Value

*Financial Consultants do not offer specific tax advice. We suggest you discuss your specific tax issues with a qualified tax advisor.

Poster

After years of slow growth, I rebranded Western Members' Financial Services, the wealth management arm of Western Federal Credit Union, accomplishing these goals:

1. **Increase awareness.** I placed signage and collateral in all 31 branches (*samples shown*) and executed targeted direct and email campaigns to the credit union's 130,000 members.
2. **Position investment advisement services as a necessity, not a luxury.** The recession left many members feeling that they had little wealth to manage. "Let Us Guide You" was non-threatening and inclusive.
3. **Make investment advisors relatable.** Advisor profiles were revised to include personal anecdotes and a description of their investment approach.
4. **Bridge the sales/marketing gap.** Investment advisors strengthened working relationships with branch managers in regular meetings; branch staff were incented for referrals; Sales 101 training workshops helped investment advisors and branch staff educate members and overcome objections; increased internal communication about Western Members' Financial Services campaigns informed all team members.
5. **Increase introductory appointments.** I organized a series of outbound sales call events. Investment advisors were given goals and offered incentives. Appointments well exceeded our expectations.

This integrated campaign doubled assets under management in one year despite a skeptical economy.



Mailer



Buckslip

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