

Planning For Your Future

At Truliant, we always have our members' best interest at heart when helping to guide their financial future.

With over 245 years of combined experience, Truliant Financial Advisors (TFA), available through CUSO Financial Services, L.P.* is your trusted partner for retirement, insurance and investment guidance designed to help you and your family through a lifetime of financial planning needs.

Helping to achieve your financial goals:

- Get answers to your retirement, insurance and investment questions
- Understand the impact of economic and market developments and trends
- Address concerns for your unique situation
- Make informed decisions to strengthen your financial standing for the short-, medium- and long-term
- Position your portfolio to help withstand volatility and risk in the financial markets
- Take action to build reliable sources of retirement income
- Recognize how trade-offs may impact your retirement lifestyle
- Private consultations to discuss your goals (by appointment, in-person or remote)
- Attentive, personalized service and solutions



Reach your retirement and other financial goals



Understand market trends



Protect and provide for your loved ones



Access to experienced financial advisors

Keeping your best interest in mind, our advisors can help with:

- 401(k), IRA and pension rollovers†
- Retirement planning
- Investments
- Social Security benefits
- Health care and Medicare decisions
- Life insurance
- Long-term care insurance
- Education funding
- Estate planning strategies
- Wealth management

Visit [Advisors.truliantfcu.org](https://advisors.truliantfcu.org) to learn more about planning for your future and scheduling your appointment with Truliant Financial Advisors.


**Truliant
Financial Advisors**

Available through CUSO Financial Services, L.P.

* 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. The credit union has contracted with CFS to make non-deposit investment products and services available to credit union members.

† Before deciding whether to retain assets in an employer sponsored plan or roll over to an IRA, an investor should consider various factors including, but not limited to: investment options, fees and expenses, services, withdrawal penalties, protection from creditors and legal judgements, required minimum distributions and possession of employer stock.