



WPCU® Retirement Solutions

Unlock Your Retirement Possibilities with WPCU!

We realize that planning for retirement can be stressful, even under the best situations. Trying to make sense of all the information can seem like an impossible and daunting task – especially if you are trying to do it on your own.

Let us get to know you and your goals, dreams and aspirations for retirement.

The financial advisors on the WPCU Retirement Solutions team are here to sit down with you side-by-side to:

- Better understand your unique situation, goals, and aspirations
- Set achievable short-term and long-term goals for a happy retirement
- Develop a plan to help you cut through the clutter and stay on your path to success

A variety of services designed with your financial well-being in mind.

- Retirement Planning for Individuals and Businesses
- 401(k), 403(b) and Pension Rollover Services**
- IRAs (Traditional, Roth and Educational)
- Mutual Funds
- Market-Linked CDs
- Stocks and Bonds
- College Planning (529 Plans and Educational IRAs)
- Insurance Products (Life, Disability and Long-Term Care)
- Fixed and Variable Annuities
- Tax and Estate Planning Strategies*
- SEP and Simple IRA Plans for Business
- Business Succession Planning

Schedule a no-obligation appointment today!

- Call (800) 762-0047 x7855
- Email Fin_Plan_Ctr@WPCU.coop
- Stop by one of our Member

Annex Building

3610 Pentagon Blvd.
Beavercreek, OH 45431

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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

** 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 judgments, required minimum distributions and possession of employer stock.