

A Program to Help You Meet Your Financial Goals

The MEMBERS Financial Services Program makes available a variety of insurance and investment products that complement those offered by your credit union. The program can provide a package of protection and asset accumulation products that can help you meet your personal financial objectives ... whether those objectives involve saving for a home, providing a college education, or planning a comfortable retirement.

The representative – a dedicated career professional carefully selected and trained to serve credit union members – can work with you to help you achieve your personal financial goals and provide information on the following services and products:

- Insurance Planning
- Retirement Planning
- Investment Planning
- Education Funding
- Business Planning
- Mutual Funds
- Stocks/Bonds



Representatives are registered, securities are sold, and investment advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor, 2000 Heritage Way, Waverly, Iowa 50677, toll-free (866) 512-6109. **Nondeposit investment and insurance products are not federally insured, involve investment risk, may lose value and are not obligations of or guaranteed by the financial institution.** CBSI is under contract with the financial institution, through the financial services program, to make securities available to members. *The CFP certification marks are not affiliated with CUNA Brokerage Services, Inc.



Giacomo Parente, CFP®*

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As a MEMBERS Financial Advisor, Giacomo is especially qualified to provide credit union members with professional assistance, quality financial products and dependable service. Giacomo is a Registered Representative of CUNA Brokerage Services, Inc., a broker/dealer with a select portfolio of securities products, such as mutual funds, and a member of FINRA and SIPC. Giacomo is also a licensed insurance representative of CUNA Mutual Insurance Society.

Education:

- B.S., Business/Management, University of Westminster, London, UK
- Earned CFP® (Certified Financial Planner) designation, 2008

Career Highlights:

- Financial Services Industry, 2004 to present

Call today for more information or to arrange a meeting. There is no obligation.