What to bring to your first appointment

Please bring the following items to your first appointment with your financial advisor

- Client Questionnaire for LPL Financial at Verity Credit Union
- Most recent statements for any banking, investing and retirement accounts

Your first appointment is complimentary. Please expect it to last about 45 minutes- 1 hour.

If you need to cancel or re-schedule your appointment, please contact us as soon as possible at lplinvest@veritycu.com or (206) 361-5312

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. Verity Credit Union is not registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using LPL Financial and may also be employees of Verity Credit Union. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Verity Credit Union. Securities and insurance offered through LPL or its affiliates are:

Not Insured by NCUA or Any Other Government Agency	**Not Credit Union Guaranteed**	**Not Credit Union Deposits or Obligations**	**May Lose Value**