

HOW CAN WE
HELP YOU?



GETTING STARTED



FINANCIAL PLANNING



LIFE INSURANCE



Working with a CFS* Financial Advisor

Our CFS* Financial Advisors are available by appointment to meet and discuss your goals. Contact a financial advisor today to set up a complimentary, no-obligation meeting.


LEARN MORE



Begin Planning For Your Financial Future

Use these tools to help educate yourself on retirement planning and other life stages and share this information with a CFS* Financial Advisor to review in further detail.

CALCULATE NOW

Request a Meeting 

First Name *

First Name (Required)

First Name

Last Name *

Last Name (Required)

Last Name

Email *

Your Email (Required)

Phone *

Your Phone Number (Required)

How Can We Help You? *

How Can We Help You?

Submit

News & Videos



Automating the American Workforce



Protect Your Heirs by Naming a Trust as IRA Beneficiary



Below Zero: The World Experiments with Negative Interest Rates



Investing in Bonds



Building Confidence in Your Strategy for Retirement



Back to Basics: Diversification and Asset Allocation

[View More](#)

*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.

Financial Advisors are registered to conduct securities business and licensed to conduct insurance business in limited states. Response to, or contact with, residents of other states will be made only upon compliance with applicable licensing and registration requirements. The information in this website is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase brokerage services to persons outside of the United States.

CFS representatives do not provide tax or legal guidance. For such guidance please consult with a qualified professional. Information shown is for general illustration purposes and does not predict or depict the performance of any investment or strategy. Past performance does not guarantee future results.