



Dear members,

Did you know that as a member of Fort Financial Credit Union, you have access to more than just traditional credit union services? We also provide comprehensive investment services, designed to help you achieve your financial goals and secure your future.

At Fort Financial, we have an experienced financial advisor ready to assist you with your investment needs. Whether you're planning for retirement, saving for your child's education, or aiming to grow your nest egg, we have the experience and resources to guide you every step of the way.

Here are some of the benefits of working with a trusted financial advisor:

- 1) **Personalized guidance:** Our advisor will work closely with you to tailor investment strategies that align with your unique risk tolerance, financial situation, and goals.
- 2) **Diverse investment options:** From stocks and bonds to mutual funds and alternative investments, our advisor offers a wide range of options to help manage risk and maximize returns.
- 3) **Professional expertise:** Whether you're a novice investor or a seasoned professional, you can rely on our advisor to provide sound advice to help you navigate the often-complex world of investing.
- 4) **Convenient access:** We believe investing should be as convenient and accessible as possible. Our advisor is available to meet both in-person and virtually, and investment accounts can be accessed online anytime, anywhere.
- 5) **Ongoing support:** Our advisor will regularly review your portfolio and provide timely recommendations to ensure that your investments remain aligned with your goals and objectives.

Fort Financial is here to help you make the most of your financial journey. Schedule a complimentary financial consultation with our financial advisor, Chris Birkenbuel, RICP® today by calling 260.435.5104. You can learn more about our investment services online at [fortfinancial.org/investments](https://fortfinancial.org/investments).

Sincerely,

A handwritten signature in black ink that reads 'Steve R. Collins'.

Steve Collins  
President & CEO



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