


# **CERTIFIED FINANCIAL PLANNER™** **professional**

## **Financial Planning Services**

**Don't dream about your future. Plan for it!** 

Working with Northeast Planning Associates, Inc., cPort offers our members access to a wide range of insurance and other financial planning opportunities. Northeast Planning Associates, Inc. utilizes its breadth of experience and insight to analyze and make recommendations on which products and services may be of value to you. We are committed to offering personalized financial strategies for our members. We'll help you focus on your future and respect your priorities.

### **Services for you and your family:**

- Financial planning
- Investment analysis
- Asset management
- College planning

### **Services for you and your business:**

- Succession & retirement planning
- Key executive benefits
- Deferred compensation
- Executive bonus
- Qualified retirement plans: pension, profit sharing,

401(k), SEP

- Employee group benefits
- Employee educational seminars

For more information or to make an appointment with a Financial Planner, please call 1-800-464-0253.

<b>Not NCUA Insured</b>
<b>No Credit Union Guarantee</b>
<b>May Lose Value</b>

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