Building Financial Strength for Your Everyday Life ... *Together*

Financial Focus NEWSLETTER

UnitedOne Retirement & Investment Services

www.UnitedOne.org/invest

HIGHLIGHTS

May 2022

LPL Move Has Arrived

As referenced in our September and January newsletters, **we're transitioning to LPL Financial**. May 20th will be our last day using CUNA Brokerage Services, Inc., as our broker dealer for transactions. The change is mostly behind the scenes on our part. Your **product holdings remain the same** and we will remain your contact for those products and services.

That being said, we've been working diligently over the last 6 months to prepare for the transition, but there are always some unexpected surprises in a move like this. **We ask for your patience** and we ask that you **reach out to us if you notice something** that hasn't continued (like a systematic investment or withdrawal) so we can find a prompt resolution and avert other similar glitches. Those with **CBSI brokerage accounts will see new LPL account numbers** and online access will need to be re-established.

Jason R Muench

Jason R. Muench, CRPC®, CFP®
LPL Financial Advisor

Financial Focus
NEWSLETTER

UnitedOne
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Financial Services Center is now

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Since we're in change mode already, we decided to revise our program name to **better identify where we're located and what we do.** To the general public, 'Financial Services Center' is pretty vague. By rebranding our department as **UnitedOne Retirement and Investment Services**, we're looking to be more clear on our identity. **Our staff will remain the same – Jason, Rob, Heidi** – and our purpose remains the same. You may also see us reference it as UnitedOne RIS.

What We CAN Control

When in New York City recently, I had no control over where the Wall Street bull was headed. **We can't control the direction of the market.** We also don't know when inflation will subside or how a war will end. **What we can do is have conversation on how the products you hold are meeting your needs and goals.** What the stock market is doing, doesn't necessarily reflect what your accounts are doing. If you have questions or concerns about your accounts or just want to take a look at how you're doing, **give us a call to set a time that we can review.**

UnitedOne Retirement & Investment Services is here to help you make important financial decisions.

For information on your accounts or to schedule an appointment with Jason or Rob, please connect with Heidi at **920-652-2570** or **invest@UnitedOne.org**

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