

May 2022

Welcome to **UnitedOne Retirement & Investment Services!** Formerly known as the Financial Services Center, we felt the new name would better identify where we're located and what we do.

**We continue to:**

- operate within UnitedOne Credit Union
- focus on products and services for retirement and investing
- maintain our same knowledgeable and helpful staff (Jason, Rob, and Heidi)

**With the name change, we now:**

- use LPL Financial as our broker dealer (we formerly used CUNA Brokerage Services, Inc.)
- increased our product and services offerings
- increased our technology capabilities

We're excited to move ahead with a fresh new look and a renewed energy to serve our existing clients and a broader scope of members.

Please connect if you'd like to learn more about how we may be of value to you!



Jason R. Muench, CRPC®

CERTIFIED FINANCIAL PLANNER™ Professional

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