MissionSquare

CHELAN COUNTY PUD #1

Meet Your Plan Representatives

MissionSquare is privileged to have served millions of public service employees like you. Our mission is to help you achieve retirement security.

Focused on all aspects of financial planning, we're dedicated to helping employees build retirement security by providing objective, personalized financial education that puts their goals first.

Retirement Plans Specialist



Kevin Zickler

Retirement Plans Specialist

(202) 759-7099

kzickler@missionsquare.com

Scan the QR code to schedule a meeting

Your Retirement Plan Specialist can:

- Help you develop and stick to a savings strategy.
- Review your plan's investment options.
- Provide resources, including online tools.
- Answer questions about your retirement plan.

Certified Financial Planning® professional



Keith Penewit, CFP®

Personal Financial Planner

(202) 759-7015

kpenewit@missionsquare.com

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Your CFP® can provide you with:

- Educational webinars and seminars.
- Virtual consultations with a CFP® professional.
- Communications on relevant financial topics.
- Personalized financial goal plan and content.

* CFP® professionals are registered representatives and investment adviser representatives of MissionSquare Wealth Management. MissionSquare Retirement is an SEC-registered investment adviser and the parent company of MissionSquare Wealth Management. MissionSquare Wealth Management is a FINRA-registered broker-dealer, and SEC-registered investment adviser, and member of SIPC. MissionSquare is an affiliate of MissionSquare Wealth Management and both are wholly owned by MissionSquare Retirement and an affiliate of MissionSquare Investments and VantageTrust Company, LLC. Securities, when offered, are offered by MissionSquare Wealth Management, a FINRA-registered broker-dealer, member of SIPC, and affiliate of MissionSquare. Custody and clearing services are provided through Apex Clearing Corporation, a registered broker-dealer and member of SIPC. MissionSquare Wealth Management and Apex are unaffiliated brokerage firms.