

INVESTMENTS

A good plan goes a long way.

Set your goal and go for it.

Our Ent Investment Services Team – registered through CUSO Financial Services, L.P. (CFS)* – has years of investing and financial consulting experience. We're ready to help you reach your goals, weigh your options and develop a comprehensive investment plan.

We believe your investment portfolio should be tailored to your unique financial situation. That's why we provide a wide range of investment products, including:

- Mutual funds
- Tax-deferred fixed-rate and variable-rate annuities
- Tax-deferred investments
- Individual Retirement Accounts (IRAs)
- 401(k), 403(b), SEP and other retirement plans
- Stocks and bonds
- Corporate and municipal bonds
- U.S. government securities
- Estate planning

Retirement Account Consolidation and Rollovers

Making sure your retirement investments are aligned with your goals and performing cost-effectively are key to maximizing your net results. Whether your current plan is held through CFS or another broker-dealer, our CFS Registered Representatives can offer valuable support as you review your current plan design, including evaluating potential benefits of consolidating or rolling over your funds.**

CFS Registered Representatives at Ent Investment Services can help you structure a retirement savings plan that best suits your needs and objectives – whether you want to maintain full investment control or have a CFS investment advisor invest your money for you.

Get started.

For more information, or to schedule a complimentary, no-obligation consultation, call (719) 574-1100 ext. 6550 or 800-525-9623 ext. 6550 today.

Investment Resource Center

Ent's Investment Resource Center located within Ent.com/Investments, is a step-by-step resource that can help you learn more about saving for retirement, paying for college, evaluating investment IRA options and more.

Once you access this complimentary, anonymous tool, you'll be prompted to answer a series of short questions that will be used to generate a high level financial "snapshot." From here, you'll see where you stand in relation to the achievement of various investment objectives such as retirement, college savings, inheritance, changing jobs, IRA options and, for the young investor, starting to invest. Once you see where you stand in relation to your goals, you can quickly and easily request a meeting with a CFS representative at a time and location that is best for you.

— Ent.com/Investments —

*Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and Registered Investment Advisor. Products offered through CFS: are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. Ent Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.

**Before deciding whether to retain assets in an employer sponsored plan or roll over to an IRA an investor should consider various factors including, but not limited to: investment options, fees and expenses, services, withdrawal penalties, protection from creditors and legal judgments, required minimum distributions and possession of employer stock.