Wealth Advisors
located at Ideal Credit Union

Below are just some of the services provided by the Wealth Advisors Team at Ideal Credit Union

- ★ 401(k) / Pension Rollovers
- ★ Retirement Planning
- ★ Education Funding
- ★ Mutual Funds
- ★ Disability and Life Insurance
- ★ Long-term Care Insurance
- ★ Wealth Management
- ★ Tax-deferred annuities (fixed/variable)

We welcome the opportunity to help you plan for your future. Schedule your no-obligation consultation online at www.idealcu.com or call 651-773-2876.

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Prepare for your future with someone you trust

Achieving Your Financial Goals

Usually financial goals start out small - like saving up for your first game, smart phone or car. As you mature they progressively become larger. Things like saving for college tuition, making sure you have enough to retire comfortably or ensuring your family's future financial health may start to appear on your list. Achieving these larger goals can become complex.

At Ideal Credit Union we have always been committed to providing products and services that bring our members closer to living their Ideal Life. We believe the Wealth Advisors Program located at Ideal Credit Union does just that by offering retirement, insurance and investment services that can help our members reach their financial goals.

Building Trust Through Personal Service

You may have one financial issue you want to tackle today, or realize it's time to put together a comprehensive financial strategy. We will take the time to listen and learn about your unique situation. We'll then analyze your situation and recommend a personalized strategy. We will walk you through your options, address any concerns and answer questions. Once you have become comfortable with a plan your Wealth Advisor Representative will be there for you through the investment process as well as for annual reviews to ensure your strategy continues to meet any changing needs.

It's Never Too Early

Whether you are thinking 5, 10, or 20 years ahead, our Wealth Advisors Representative is here to assist you in creating a strategy that will help you achieve the financial goals that get you closer to your Ideal Life. To schedule a no-obligation consultation call 651-773-2876 or go online at www.idealcu.com.

Meet Our Wealth Advisors Team

We would like to introduce you to Craig Lundquist – the Senior Wealth Advisor located here at Ideal Credit Union.

Craig comes to the Ideal Wealth Advisors team with a great deal of related investment experience – he has worked in the investment and insurance industry since 2002. Craig is committed to building long and solid relationships. He operates with integrity and brings a strong skill set and expertise in understanding the importance of member relationships. His passion is to serve members by assisting them with building, maintaining, and protecting their wealth through solid financial planning strategies. We are excited to have him share his knowledge with our members.

Working along side Craig is the Senior Wealth Advisor Office Coordinator - Kristin Becker. Kristin will work with Craig to provide expanded services and broader expertise to Ideal CU members.

Kristin Becker
Senior Wealth Advisor
Office Coordinator

Together Craig and Kristin will provide the expertise and service needed to assist you in creating a financial plan that will help land you right where you want to be.

Representatives are registered, securities are sold, and investment advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor, 2000 Heritage Way, Waverly, Iowa 50677, toll-free (866) 512-6109. **Nondeposit investment and insurance products are not federally insured, involve investment risk, may lose value and are not obligations of or guaranteed by the financial institution.** CBSI is under contract with the financial institution, through the financial services program, to make securities available to members.

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"...developing a financial plan that aligns with your specific needs, timeline and risk tolerance is my honor and highest priority"

Craig Lundquist
Senior Wealth Advisor