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**Hurricane Irma Assistance:** All Florida and Georgia branches are open to serve members and we are here to help! [Click here for more information.](#)


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**Equifax Breach:** Have you checked to see if you're a victim of the Equifax Breach? [Click here to learn how.](#)





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# Financial Planning & Investment Services "Meet and Greet"



## Take the Guesswork out of Investments

We believe in helping you make the most of your money. That’s why we make available one-stop shopping for investments and financial planning.\*

### MEET WITH A FINANCIAL ADVISOR AND RECEIVE A \$25 BONUS†

Whether you’re looking for guidance on just one financial need you want to tackle today, or if you’re interested in putting together a comprehensive plan, the financial planning division offers retirement, investment and insurance plans designed to help you and your family through a lifetime of financial planning needs.

Learn more about this service at any one of our Complimentary Member Meet and Greet at the following branch locations:

#### Florida Branches

**from 11:00 a.m. – 3:00 p.m.**

- Friday, October 6 – **Palm Beach Gardens**
- Friday, October 13 – **St. Lucie West**
- Wednesday, October 18 – **West Palm Beach**
- Friday, October 20 – **Delray Beach HQ**
- Friday, October 27 – **Boca Raton**
- Friday, November 3 – **Cypress Creek**
- Friday, November 10 – **Delray West Atlantic**
- Friday, November 17 – **Boynton Beach**

Wednesday, November 29 – **Military Trail**

Schedule an appointment with Florida IBMSECU Financial Advisor Claire Hart at 561.982.7706 or **Claire.Hart@cunamutual.com**.

**Georgia Branches**

**from 10:00 a.m. – 2:00 p.m.**

Wednesday, October 4 – **Wildwood**

Thursday, October 5 – **Marietta**

Thursday, October 12 – **Southlake**

Tuesday, October 17 – **Barfield**

Wednesday, October 18 – **Mansell Commons**

Friday, October 20 – **South Cobb**

Tuesday, October 24 – **Barrett Parkway**

Wednesday, October 25 – **Jasper**

Friday, October 27 – **Federal Center**

Schedule an appointment with Georgia IBMSECU Financial Advisor Rob Means at 678.569.1669 or **Rob.Means@cunamutual.com**.

**Learn more about IBMSECU Financial Planning and Investment Services.**

† Participate in a complimentary financial consultation via phone or in person with a CBSI Financial Advisor between October 1 and November 30, 2017, and receive a \$25 bonus. The \$25 bonus will be deposited into your IBMSECU Membership Savings account by December 20, 2017. Bonus payments are sponsored and paid for by IBMSECU. No purchase necessary, limit one (1) bonus per potential investor/consultation.

\* Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. CBSI is under contract with the financial institution to make securities available to members. Not NCUA/NCUSIF/FDIC insured, May Lose Value, No Financial Institution Guarantee. Not a deposit of any financial institution. CBSI is a registered broker/dealer in all fifty states of the United States of America.

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Events



Financial Planning & Investment Services "Meet and Greet" on Oct 1 - Nov 30  
[Learn More](#)



Florida Shred Days on Oct 2 - Oct 5  
[Learn More](#)



IBMSECU closed for Columbus Day on Oct 9  
[Learn More](#)

Not a Member?

JOIN US TODAY

Since 1969, our Credit Union has been built on “people helping people.” We value your Membership and look forward to meeting all your financial needs. If you have any questions, please **contact us**, call **800.873.5100**, or email **serviceplus@ibmseu.org**



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