



Take Charge of Your Financial Future

investment services ○ | ○ | ○

A TEAM APPROACH TO ADVISING CLIENTS ON THE RIGHT STRATEGIES DEVELOPS A SOUND FINANCIAL PLAN.

Members First has partnered with Rodney Rich & Company to provide members with investment and retirement planning services. Rodney Rich & Company is a premier brokerage firm offering general securities services to corporate and individual investors through Cadaret Grant, one of the top five privately owned broker/dealers in the Country.

Maintaining an independent firm gives flexibility and access to many investment vehicles and a broad array of companies. We give you a real person to talk to and experts you can rely on. Rodney Rich & Company can provide you with many investment tools and products including:



- Stocks, Bonds & Mutual Funds
- IRA's, Roth IRA's
- Variable Annuities
- Retirement Planning & Rollovers
- Trusts & Estate Planning
- 529 College Savings Plans
- Life Insurance
- Disability Insurance
- Long Term Care Insurance



points to consider

HAVING AN INDEPTH UNDERSTANDING OF YOUR NEEDS AND GOALS IS A FUNDAMENTAL PROCESS TO THE WAY WE WORK WITH YOU.



- Do I have enough money to retire?
- How will I pay for my children's college education?
- Should I be more diversified?
- Who will pay for my funeral?
- Is it too late to save for retirement?
- What about Long Term Care or Disability Insurance?

compliance & regulation

**Non-deposit investment products and services are offered through Cadaret, Grant & Co., Inc, a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through Cadaret, Grant & Co. 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 Cadaret, Grant & Co. The Credit Union has contracted with Rodney Rich & Co. to make non-deposit investment products and services available to credit union members.*

Founded in 1985, Cadaret Grant is one of the largest privately owned independent broker/dealers in the country, servicing more than 900 financial advisors in branch offices nationwide.

Cadaret Grant strives to meet the business requirements of both advisors and clients through exemplary service, first-rate technology, and support systems that maximize the power of fresh, innovative thinking focused exclusively on the personal success of each individual investor.

INVESTMENT PARTNER • WWW.RODNEYRICHCO.COM
 MEMBERS FIRST CREDIT UNION OF FLORIDA • P: 850.434.2211 • F: 850-434-9995 • E: MFCUFL@MFCUFL.ORG
 64 SOUTH REUS STREET, PENSACOLA, FL 32502

