

EMPOWERING YOUR FINANCIAL JOURNEY

At LPL Financial, we're more than just advisors – we're your partners on the journey to financial confidence. We understand that every financial situation is unique, and we're here to help you navigate the complexities of wealth management, investment planning, and working toward achieving your life's aspirations.

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HOW WE CAN HELP

We're excited to introduce a new partnership at First Service with Seth Currens, a financial advisor affiliated with LPL Financial, offering you access to a broader range of investment options tailored to your unique goals.

As an LPL-affiliated advisor, Seth delivers innovative strategies backed by industry-leading research and technology providing personalized guidance through every stage of your financial journey.

Whether you're just starting your career, changing jobs or planning for retirement, Seth and the team at LPL are here to help you navigate life's financial decisions with confidence. Partner with Seth to build a customized financial strategy that supports your goals and aspirations.

Let's navigate your financial future, together.

Securities and advisory services are offered through LPL Financial (LPL), a registered and investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. The credit union is not a registered as a broker-dealer or investment advisor. Registered representatives of LPL may also be employees of the credit union. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of the the credit union.

Securities and insurance offered through LPL or its affiliates are:

Not Insured by NCUA or Any Other Government agency		
Not Credit Union Guaranteed	Not Credit Union Deposits or Obligations	May Lose Value

AREAS OF PRACTICE

FINANCIAL PLANNING

- SETTING FINANCIAL GOALS
- BUDGET + CASH FLOW PLANNING
- DEBT MANAGEMENT PLAN
- COLLEGE PLANNING (529)

RETIREMENT PLANNING

- 401K, 403B ROLLOVER SERVICES
- IRA
- ROTH IRA
- BENEFICIARY ROTH/IRA
- BUSINESS RETIREMENT SETUP

INVESTMENTS

- STOCKS
- BONDS
- ETF'S
- MUTUAL FUNDS
- STRUCTURED PRODUCTS
- ANNUITIES

ESTATE PLANNING

- TRUST ACCOUNTS
- SUCCESSION PLANNING
- INSURANCE

