Kathy Chesney
ChFC · CLU
Financial Advisor
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Check the background of this investment professional on FINRA's BrokerCheck at http://brokercheck.finra.org/

Background

Helping you reach your financial goals is my number one objective. Working together, I'll help you make sound financial decisions consistent with your comfort level, investment time-line and goals. We can start small and grow, or evaluate and build upon any existing financial plans. The end result will be a strategy designed to help you build, protect, use and transfer assets in the most advantageous way. Periodically we'll review your situation and make adjustments as needed. It just makes sense - as your life changes, so do your financial needs, and I'll be here for you at every stage of your life.
As a trusted partner of Pacific Marine Credit Union, I have a strong history of working with credit union members, their family and their friends. I have access to a wide variety of investment and insurance products. Specifically, we can make sure you have solid answers to these key questions:

- Is your retirement money invested properly?
- Will you have enough income in retirement?
- What should you do with an existing retirement plan from a previous employer?
- How will you pay for a child's or grandchild's education?
- Financially, what would happen to your family if you died?
- How will you pay for long-term care?

I am a Registered Representative of CUNA Brokerage Services, Inc., member FINRA/SIPC. I am also a licensed representative of CMFG Life Insurance Company.

Education

Earned CLU (Chartered Life Underwriter) designation, 2007
Earned ChFC (Chartered Financial Consultant) designation, 2006
A.A., Associate of Arts, Technical College, South Carolina, 1995

Affiliations

CUNA Brokerage Services Women of Distinction Member

Career Highlights

Thirty years credit union experience in various capacities
Financial Services Industry, 1999 to present
Life Insurance Sales, 2000 to present

2001 Paramount Award
2004 - 2008 MEMBERS Excellence Award
2008.,2014 Silver MEMBERS Medallion Award
2009 – 2013, 2015 Gold MEMBERS Medallion Award

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