Work With Someone *You Trust*

Programs to Help Meet Your Financial Goals

- Retirement Planning
- Investments
- Trust Services & Estate Planning
- Managed Account Portfolios
- College Funding
- Insurance
- Mutual Funds
- Business Retirement Accounts
- Stocks & Bonds

Suncoast
Trust &
Investment
Services

Planning for Life.

Nancy D. McGee, CFP®*
Financial Advisor
Trust Liaison Officer

Located at
Suncoast Schools Federal Credit Union
1533 Matthew Drive
Fort Myers, Florida 33907
(866) 300-9382, extension 86730
nancy.mcgee@suncoastfcu.org

As Financial Advisor and Trust Liaison Officer, Nancy is available to provide members with objective expert advice and recommendations personalized for your individual goals.

With an extensive background in finance, insurance and investments, she brings solid credentials to the Suncoast Trust & Investment Services program, located at the credit union:

- CERTIFIED FINANCIAL PLANNER™
- Life Underwriting Training Council Fellow Designation
- Bachelor in Business, Empire State College, 1984
- Financial Services Industry for over 10 years

Nancy is very active in the community and has served on several local non-profit boards including Meals on Wheels, Abuse Counseling & Treatment, Inc., and as former instructor at Edison Community College.

Nancy says, "My goal is to help you meet and exceed your personal financial objectives - and do this within the framework of what is always in your best interest."

When you trust us with your financial goals, we strive to provide you with knowledgeable advice, dependable service and a commitment to *holding your goals as our own*.

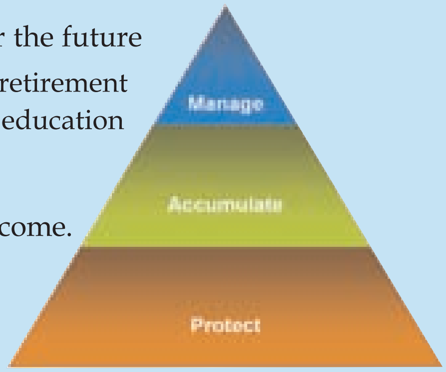
A ROADMAP for Your Financial Future

Suncoast Trust & Investment Services

When you're making important financial decisions about your future, you want sound, objective advice from someone who knows you well.

You've come to the right place. Our experienced professionals are here to help you:

- Build your base by evaluating your insurance protection needs.
- Accumulate assets for the future
  - Save and invest for retirement
  - Save and invest for education
- Manage wealth.
- Create a retirement income.
- Plan your legacy.



We can help with a specific need, such as investing retirement money, or we can provide comprehensive wealth management services, covering all aspects of your financial life.

Our roadmap.

Working together, we'll create a roadmap for achieving your goals based on sound investment and protection principles.

1 Gather Information
We'll listen carefully and conscientiously to your financial goals and concerns.

2 Analyze and recommend
We'll study your information, research and evaluate your alternatives, and then share our recommendations with you.

3 Implement
We'll provide you with information on financial products and services that will help you reach your goals. You'll feel confident about your plan of action.

4 Monitor and review
People, personal circumstances and the economy all change. It's important to be prepared.

We'll be an active, committed partner in making sure your plan continues to help you reach your financial goals over time.

Exceptional service from people you know, at a financial institution you trust.

What you can expect from us.

Sound, objective advice — You'll receive advice and recommendations personalized for your individual goals and financial situation.

Experienced financial service representatives — Your representative is a fully registered, licensed and experienced investment and retirement planning professional.

Careful analysis — We use state-of-the-art technology to develop your plan, analyze opportunities and evaluate results.

Comprehensive financial choices — Choose from a wide array of mutual funds, stocks, bonds, insurance and annuities.

A superior experience — You can be confident that you're getting the best financial advice and service available. We'll treat you as an individual and be your trusted partner in helping you achieve your long-term financial goals.

Confidentiality -The more information you share, the better we can analyze your finacial situation. And the more thorough our analysis, the better we can help you reach your financial goals. All information you share with us is kept strictly confidential, as required by law. We guarantee to serve you with respect, trust and integrity.

Be confident in your future.

Together, we'll help you build your roadmap for the future, and reach your financial goals.