



**Lysa J. Rothenberg**

*Financial Advisor, CFP®*  
Navy Federal Investments & Insurance Services

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**Education:**

- B.S., Business, Skidmore College
- Earned CFP® (Certified Financial Planner) designation, 1986

**Career Highlights:**

Trained in a variety of investment and insurance strategies, our financial representatives work with you to design a program which can provide asset accumulation and protection based on your personal objectives. Lysa Rothenberg is a resource for discussing how to secure your retirement plans, college planning, as well as life insurance and estate planning options.



# Creating a plan for your financial future

The services of Navy Federal Investments & Insurance are designed to help you organize your financial affairs and plan for the future. They complement the financial management products and services offered by Navy Federal Credit Union.

**Retirement planning**

Navy Federal trained representatives can explain IRAs, rollovers and annuities to help you retire with confidence.

**Saving for college**

Do you have questions about saving for your child's education? Our representatives can provide information and help you start or maintain a funding program, including Education Savings Accounts and 529 Plans.

**Life insurance for emergencies**

Our advisors will help you choose from a variety of low-cost term, whole life insurance and variable universal life coverage.

**Protect your wealth with estate planning**

It's never too late to arrange for the distribution of your wealth. Navy Federal's trust officers can review documents that outline your wishes for distributing your assets to your dependents.

We make all this available and more:

- Mutual funds, stocks, bonds and annuities
- Internet brokerage services
- Estate planning
- Term, whole life and long-term care insurance

- Trust services
- Auto insurance underwritten by GEICO®
- Free seminars—visit [navyfederal.org/investrep/](http://navyfederal.org/investrep/) and click on "Seminar Schedule" for dates, times and topics, or call 1-877-221-8108.

**Building your financial program**

For most, achieving and maintaining financial strength is a lifetime pursuit. It involves planning, preparation, performance and follow-through during all life stages.

**Protecting assets**

The first priority is protecting what you have, including your standard of living, through insurance programs for individuals, family and business needs.

**Increasing net worth**

Next you'll want to expand your financial resources through diversified investment programs—mutual funds, stocks, bonds, annuities, money market funds, limited partnerships, unit investment trusts and other products—depending upon your financial objectives.

**Managing accumulations**

Finally, the timely effective management of accumulations—including transfers of assets and estate planning—is vitally important to the continuous goal of achieving lifetime financial strength.

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