

VYSTAR INVESTMENT SERVICES



Explore your investment options and let us help you plan for the future and achieve your goals. Customize a financial solution to meet your specific needs. And as circumstances change, we'll help you monitor your program to keep it on course. Make investment decisions like a pro with the help of a pro – the helpful advice of a VyStar Investment Services Financial Advisor.

We make investment and financial management products available to help you reach your financial goals, investment timelines, and risk tolerance levels. We provide financial analysis and planning services at no cost or obligation. Together, we can help you:

- **Plan Your Investments**
- **Plan to Retire More Comfortably**
- **Fund Your Children's Education**
- **Protect Your Financial Future**

You have access to a comprehensive list of value-oriented products and services, including:

- **Mutual Funds**
- **IRAs**
- **Securities Trading**
- **Asset Allocation**
- **Insurance Services**
- **Fixed and Variable Annuities and more**

Our Process For Achieving Your Goals

At VyStar, we take a needs-based approach and want to work with you to help you achieve success in meeting your financial goals.

Our needs-based approach means learning more about your financial needs, situation and goals. We gather information through face-to-face meetings, phone conversations and written communications with you.

Located at:



P.O. Box 41213,
Jacksonville, FL 32203
www.vystarcu.org

We study the basic input carefully, then prepare recommendations based on your financial foundation and the goal you are trying to reach. A risk assessment is conducted to make sure investments are compatible with your risk tolerance.

Then, working closely with you we activate your financial management program. Any decision you make and any actions you take are entirely up to you.

People, personal circumstances and the economy change. The most important part of your financial process are reviews. We monitor your financial management program with you, keeping it on course to help meet your financial needs and goals.

Let us help you craft a plan appropriate for your lifestyle. Call (904) 908-2495 or (800) 445-6289, ext. 2495 today, to speak with an Investment Services Financial Advisor or arrange to meet with us at any VyStar branch location.

Retirement Planning for Businesses

Created in response to the needs of our business members, VyStar Investment Services offers 401(k) retirement programs for select employee groups, business members and other local businesses in the Northeast Florida Community. Wouldn't you like to know the difference between having a retirement plan and having the right retirement plan for your business? Call us for details.

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