



## MEMBERS 1<sup>ST</sup> Investment Services



**Mark Gregor**

Mark works closely with our clients to help them reach their individual financial objectives. Through personal consultation, Mark strives to fully understand your needs and long-term goals. He then develops comprehensive recommendations that are straightforward, easy to understand and structured to help you appropriately invest and diversify your holdings, so your needs and goals can be met.

An alumnus of St. Louis Christian College in Florissant, Mo., Mark holds his securities and life and health insurance licenses. Mark has comprehensive training in financial planning and products.

Let Mark work with you to help achieve your financial goals and give you the personal service you deserve.



## MEMBERS 1<sup>ST</sup> Investment Services

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### **Mattis Office**

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Administrative Fax: 314-845-0550

### **Festus Office**

1200 East Gannon Drive  
Festus, MO 63028-2614

636-931-7144

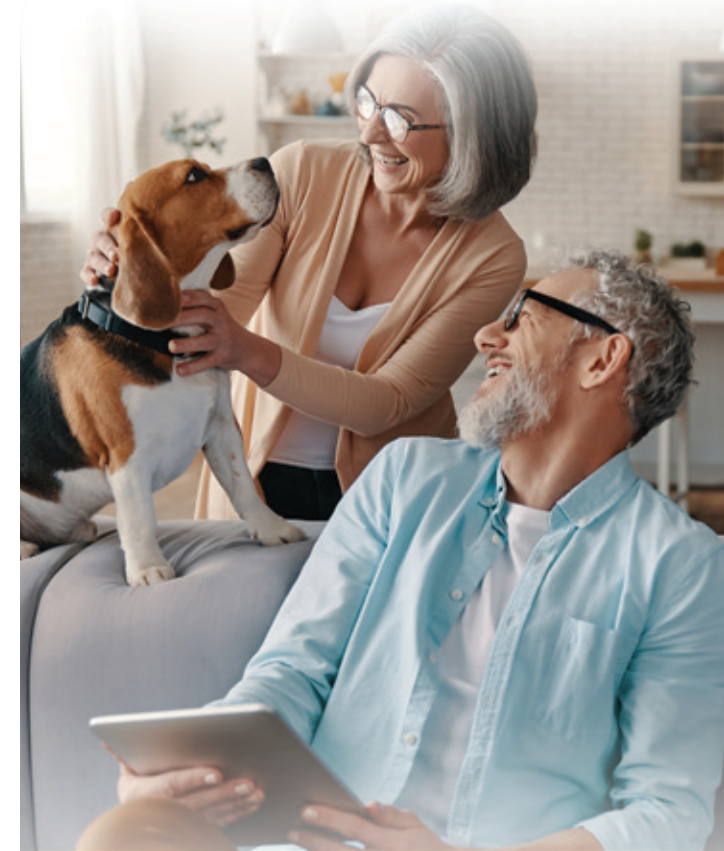
636-937-7144

Fax: 636-937-3733



## MEMBERS 1<sup>ST</sup> Investment Services

# Investment Services



*Make Your Money Do  
More for You!*

Members 1st Investment Services is a division of Members 1st Credit Union (MICU). Securities are: not insured by the NCUA; not a deposit or other obligation of, or guaranteed by, the depository institution; subject to investment risks, including possible loss of the principal amount invested. Securities, Insurance, and Investment Advisory Services are offered through Midwestern Securities Trading Company, LLC (MSTC). Member FINRA/SIPC. MSTC and MICU are not affiliated. Check the background of this investment professional on FINRA's BrokerCheck.

# Services We Provide

## Financial Consultation

We offer a free consultation to evaluate your financial situation. We take time to learn about you. We then craft and implement solutions to help you achieve your financial goals. But it doesn't stop there. Our clients are welcome to meet with us any time to review their current situation.

## Portfolio Construction & Management

We construct a portfolio based on your current situation and the goals you're trying to meet. Planning is a process. That's why we encourage regular reviews of your portfolio.

## Life, Disability & Long-Term Care Insurance Planning

We work with many insurance companies and can provide you with the right information based on your insurance needs. Ask us for a free quote.

## Investment Research & Analysis

We invest in a wide array of tools to use when it comes to researching your current and future investments. Please feel free to request a sample.

## Educational Seminars

We strongly believe in the value of financial education in an ever-changing world. We conduct seminars on various topics ranging from college savings to retirement income. Please let us know if you have an interest in a particular topic.

## Employer-Sponsored Retirement Plan Analysis for Business Owners & Managers

We analyze the current plan offered to your employees and provide objective feedback. If areas need improvement, we'll recommend a course of action. We also assist in the implementation of plans that meet your business needs.

# The Value of Partnership

At Members 1st Investment Services, we know that no two clients are exactly alike or share the exact same goals. That's why, when it comes to helping you attain your financial goals, our financial advisor gets to know you, your plans, hopes, worries and needs before attempting to offer a strategy.

Once your unique circumstances and current assets have been thoroughly evaluated, our financial advisor will make recommendations designed to help you achieve your objectives. We take the time necessary to make a difference for you, your family and your future. We want to learn about you and your financial goals.



## Products We Offer

- Annuities
- Bonds
- Disability Income Insurance
- Investment Accounts
- Life Insurance
- Long-Term Care Insurance
- Mutual Funds
- Stocks

## Types of Accounts

**Brokerage:** Whether your account is commission or fee-based, we have the flexibility to help build and manage your portfolio in a manner tailored to meet your comfort level.

**Mutual Fund Accounts:** These are accounts held directly at a particular mutual fund company.

**529 College Savings Plan:** Set aside funds for future educational costs.

**Employer-Sponsored Plans:** We provide 401(k), 403(b), Simple IRA and SEP IRA options.



# Financial Consultation

Yes! I am interested in a no-cost, no-obligation financial consultation. I would like information on the following:

- Funding education for children or grandchildren
- Income strategies in retirement
- IRAs (Traditional, Roth, SEP, Simple and Rollover)
- Life insurance for myself, my spouse and/or children
- Saving for retirement
- Other \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/ZIP

\_\_\_\_\_  
Phone

Please return to:

Mark Gregor, Members 1st Investment Services  
4702 Mattis Road, St. Louis, MO 63128-2822

or

1200 East Gannon Drive, Festus, MO 63028-2614

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