Ryan Batey

Financial Advisor

Helping you reach your financial goals is my first priority. I believe in an educational approach to financial planning - the more you understand your plan, the more comfortable you are with decisions we make together moving forward. Working together, we'll review your goals and make a plan to financially reach them.

Specifically, we'll address these common topics:

- 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?

We can start small and grow or evaluate and build upon existing financial plans. After we meet, you'll be equipped with a strategy to build, protect, use and transfer assets in the most advantageous way. Periodically, we'll review your situation and adjust as needed. As your life changes, so do your financial needs, and I'll be here for you every step of the way.

I have twelve years of experience working with credit union members, their family and their friends. I offer a wide variety of investment and insurance products. I am a Registered Representative of CUNA Brokerage Services, Inc., member FINRA/SIPC and a licensed insurance agent.

It's easy to get started. Please contact me for a no-cost, no-obligation consultation.

Personal . . .

I have lived in the Quad Cities most of my life. My wife Mary and I, along with our 5 children, are proud to be an active part of this community. I enjoy spending time with my family along with hanging out at our neighborhood pool.

Professional Services

- Retirement Planning
- 401(k) Planning
- Long Term Care Insurance
- Life Insurance Planning

- Personal Financial Assessments
- Education Funding
- Investment Management for Seniors
- Comprehensive Financial Guidance