

Resume

of

Glen Thiessen, CFP[®], CLU, ChFC, RHU, REBC, CASL

Objective: To advise my clients regarding their

- Retirement Planning
- Income Planning
- Investment Planning
- Tax Planning
- Insurance Planning
- Estate Planning

Experience: **1983-1993** ***New York Life Insurance Company***
51 Madison Avenue
New York, NY 10010

- Wrote individual and group **life** insurance.
- Wrote individual and group **medical** insurance.
- Wrote individual and group **disability** insurance.
- Wrote individual **Medicare supplement** insurance.
- Managed **investment portfolios** for retirement and other major goals.

1993-2002 ***BECU Financial Services***
12770 Gateway Drive
Tukwila, WA 98168

- **Taught seminars on:**
 - IRA Required Minimum Distribution (RMD) Issues
 - Estate Planning Basics
 - Advanced Estate Planning
 - Investment Planning
 - Long Term Care
 - Retirement Planning
 - 401(k) Distribution Options
 - Various other topics
- Determined the feasibility of retirement goals
- Examined methods to minimize taxes
- Designed investment strategies that satisfied income needs
- Created greater flexibility for pension survivor options
- Discussed long term care portfolio protection
- Reviewed wealth creation and preservation techniques

- Increased awareness of issues that may have been overlooked in the financial planning process

2002-Present ***Transition Planning***
22221 NE 11th Place
Sammamish, WA 98074

- Continued Advisor relationships with many BECU clients at their request

Licenses: Life, Health and Long Term Care agent in FL, VA, and WA
 Securities licensed (Series 6, 7, 22, 63, & 65) with FINRA as a
 Registered Rep in CA, ID, MN, MT, OR, TX, VA, and WA

Credentials: Chartered Financial Consultant (ChFC) 1995,
 American College, Bryn Mawr, PA
Chartered Life Underwriter (CLU) 1996,
 American College, Bryn Mawr, PA
Registered Health Underwriter (RHU) 1999,
 American College, Bryn Mawr, PA
Registered Employee Benefits Consultant (REBC) 2001,
 American College, Bryn Mawr, PA
Certified Financial Planner (CFP®) 2004,
 BISYS Education Services, St Rose, LA
Chartered Advisor for Senior Living (CASL) 2006,
 American College, Bryn Mawr, PA

Affiliations: Society of Financial Service Professionals

Continuing Education:

<u>Requirement</u>	<u>Time Frame</u>	<u>Purpose</u>
24 Hours	Bi-Annually	Maintain Life & Health Ins License
4 Hours	Bi-Annually	Maintain LTC Insurance License
30 Hours	Bi-Annually	Maintain CFP®, CLU, ChFC, RHU, REBC, and CASL designations

- Goals:**
1. Work collaboratively with other professionals towards optimal solutions for clients' financial plans.
 2. Skillfully use changes in tax codes, planning strategies,

markets, trends, and investments for my clients' benefit.

Mission Statement: To be a contributing part of a team of professional advisors working collaboratively to help you more effectively plan ahead for the major transitions in your life using a values-based, goal-oriented planning process, potentially resulting in a more positive legacy for you.

Mobile: (206) 409-4329 Messages: (206) 582-0222

FAX: (866) 785-4453

Email: glen@transitionplanninginc.com

Website: www.transitionplanninginc.com

22221 NE 11th Place, Sammamish, WA 98074-6887

Transition Planning is a dba of Clear Creek Financial Management, LLC. Advisory services are only offered to clients or prospective clients where Clear Creek Financial Management, LLC and its representatives are properly licensed or exempt from licensure.