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CUE FINANCIAL GROUP, INC. TO PARTNER WITH TUCSON ELECTRIC POWER FEDERAL CREDIT UNION

CUE Financial Group and Tucson Electric Power Federal Credit Union will begin a new and unique partnership designed to assist credit union members and their families in effectively planning and maintaining their financial future through personalized advice and educational workshops.

Members and their families coming to the credit union for financial and retirement advice will be encouraged to make an appointment with Samuel E. Hawtree, certified financial planner and registered investment advisor with CUE Financial Group. Hawtree, who has more than 20 years of planning experience, will have an office on the premise of the credit union.

“I am here to help the credit union educate their members,” said Hawtree. “I will assist members in clarifying their financial objectives, and then we will find strategies and financial opportunities to meet those objectives.”

In addition to giving personalized financial advice, Hawtree will also teach a series of workshops, which he developed and taught at Pima Community College.

“I’ve been a long-time educator,” said Hawtree. “We have taken the community college courses, which are my own, and are now offering them to credit union members, family, and friends for the cost of the materials.” For instance, a two-hour workshop at Pima College runs \$23. But credit union members will pay \$3.

“I do a big workshop that takes 3 hours for two nights, and it comes with a 164 page workbook,” said Hawtree. Pima Community College students pay \$85 for the workshop. Credit union members and their families will pay \$15.

This two-day workshop, called **“Planting the Seeds for Investment Success,”** will cover such topics as:

- How will I pay for my children’s college costs?
- How can I get tax-free income?
- How can I manage my cash every month so I end up with extra dollars?
- How do I free up some money for investing?
- What are the best investments?
- Am I going to have enough to retire?

Other workshop topics will include **Estate Conservation, Personal Financial Management, Asset Allocation, Retirement Plan Distributions, and Saving for Retirement with 401K Plans.**

“The partnership between the two companies will make financial planning for credit union members more convenient,” said Judy Kuplic, executive vice president for

CUE Financial Group.. “CUE Financial is concerned about helping people properly manage their money and plan for their financial future. Tucson Electric Power Federal Credit Union is concerned about the same thing, so the partnership is well-suited.”

CUE Financial Group, one of the valley’s leading Registered Investment Advisors, has been providing financial, estate, and retirement planning services to individuals and corporations for many years in Arizona, New Mexico, and California. Tucson Electric Power Federal Credit Union is one of the leading credit unions in the Tucson area.

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