



8210 West Market Street
Greensboro, NC 27409

Investments / Life Insurance
Triad: 336-662-6262 or 800-632-0210 x6262
Triangle: 919-571-0767 x6464 or 800-632-0210 x6464

Automobile / Homeowners
336-662-6240 or 866-334-1491

Summit Financial Services provides members with services they would not typically find at their financial institution. Our representatives provide the same competent and caring service that our members have come to expect from their Credit Union.

Lincoln Financial Securities Corporation.

Our partnership with Lincoln Financial Securities Corporation provides the very highest quality investment and insurance solutions for our members.

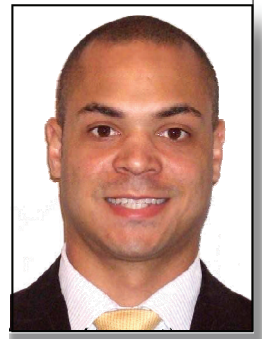
Life Planning & Investments

- Retirement Planning
- Investments
- Life Insurance
- Long Term Care
- Wealth Building

Marc Lopresti works out of our Administrative office and serves Triad area and Hickory; Andre Williams works out of our Raleigh branch and serves members in the Triangle area of NC. Both hold FINRA sponsored Series 7 and 65 securities licenses and can help members with investments, annuities, life and long-term care insurance, as well as help members build a customized financial plan working toward their individual financial goals.

We recently were able to help Carol G., showing her investment options with her retirement funds and helped her make investment choices she was comfortable with.

We also have recently help Wesley I., and family, develop a comprehensive financial plan to address their life insurance needs, their retirement investments, and consolidate investments that were spread over several different financial institutions.



Marc Lopresti

Andre Williams

Registered Representatives
Lincoln Financial Securities Corporation

“We are passionate about helping members build wealth and preserve wealth for their families.”

Representatives are registered, securities are sold, and investment advisory services offered through Lincoln Financial Securities Corporation, member FINRA/SIPC. Non-deposit investment products are not federally insured, involve investment risk, may lose value, and are not obligations of, or guaranteed by, Summit Credit Union. Lincoln Financial Securities Corporation is under contract with Summit Credit Union to make securities available to members.

Summit Property and Casualty Insurance Agency, LLC.

Summit P&C was established to offer our members the best possible price on insurance for automobiles, homeowners, motorcycles, boats, RVs, renters, personal liability, and business insurance.

Here are just a few examples of how Summit P&C has helped members save money:

*Member: Bertram W. – auto insurance
Former Premium: \$469.33 / six mo.
Summit Premium: \$366.82 / six mo.
Savings: \$205.02 per year!*

*Member: Roger P. – auto insurance
Former Premium: \$1,066.48 / six mo.
Summit Premium: \$826.86 / six mo.
Savings: \$479.24 per year!*

For Your Insurance Needs

- Auto Insurance
- Homeowners Insurance
- Motorcycles
- Boats and RVs
- Personal Liability
- Commercial / Business

Summit Property & Casualty Insurance Agency, LLC



Glenn Kirk
Agency Manager

“We offer insurance through a number of different insurance carriers. Therefore we are able to choose carriers that offer the right combination of coverage and value for each individual member. Our goal is to save our members money on all their insurance needs.”