

News Release

**LPL Financial Advisor Stephen Rafter Joins SECU Financial Partners**

*Seasoned financial professional joins SECU Financial Partners bringing 12 years of advising experience*

**BALTIMORE** (Dec. 16, 2021) —SECU Financial Partners is pleased to announce that Stephen Rafter joined the firm as an LPL Financial Advisor, bringing more than a decade of experience in Financial Services.

With 10 years of wealth management experience, Rafter will be a critical member of the SECU Financial Partners team where he will focus on providing a holistic approach to financial planning. This approach offers a partnership between advisor and credit union member in support of their overarching financial goals.

“SECU Financial Partners has grown substantially over the last year with many thanks to the talented financial consultants who continue to join our team,” said Jim Mellendick, Vice President of SECU Financial Partners. “Stephen’s extensive financial knowledge and experience will continue to strengthen our advisor team and differentiate our business by delivering a more personalized approach to our clients.”

Rafter joins SECU Financial Partners with prior consulting experience at Charles Schwab. In his previous role, Rafter managed a book of business of 200 clients with a minimum of $250k worth of assets with the firm. Prior to his position at Charles Schwab, Rafter was an advisor at Bank of America Merrill Lynch in Baltimore, Maryland. He has spent his career understanding an individual’s goals and objectives, and implementing customized strategies to pursue the highest probability of success in support of those goals. Rafter holds a Bachelor’s degree in Natural Resource Economics from the University of Massachusetts, Amherst.

“I’m incredibly grateful for the opportunity to be a part of a team of such knowledgeable and skilled professionals at SECU Financial Partners,” said Rafter. “As a Baltimore resident for several years, I look forward to becoming an advisor for SECU clients and working closely with them to accomplish their financial goals.”

For more information about SECU Financial Partners, visit [secufinancial.org](https://secufinancial.org).

**About SECU Financial Partners**

Launched in 2021, the financial consultants at SECU Financial Partners provide an inclusive, holistic approach to financial planning, which offers a partnership between advisor and credit union members in support of their overall financial and personal goals.

**Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC).** Insurance products are offered through LPL or its licensed affiliates. SECU and SECU Financial Partners **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using SECU Financial Partners, and may also be employees of SECU. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, SECU or SECU Financial Partners. Securities and insurance offered through LPL or its affiliates are:

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