



BG | INVESTMENT
SERVICES, INC.

Clients We Serve:

All those looking for greater return potential on their funds:

- Individuals
- Families
- Small Businesses
- Corporations
- Non-Profit organizations
- Governments

Products and Services We Offer:

- **Brokerage Accounts**
 - for various investment purposes
- **Traditional IRA**
 - contributions are tax deductible and grow tax-deferred
- **Roth IRA**
 - contributions are post-tax; earnings are tax-free after five years
- **IRA Rollover**
 - rollover your 401(k) account into a Traditional IRA
- **Small Business Retirement Planning**
 - Alternatives to a 401(k) plan
 - SIMPLE IRA
 - SEP IRA
- **529 College Savings Accounts**
 - Earnings are tax-free if used for qualified expenses
 - Qualified expenses include a wide range of college expenses, in addition to K-12 tuition expenses
- **Uniform Gift to Minors Accounts (UGMA)**
 - Invest on behalf of a minor with a custodial account

Investments Offered:

- Stocks
- Bonds
- Certificates of Deposit
- Mutual Funds
- Exchange Traded Funds (ETF)
- Money Market Funds

All products and services offered in partnership with Fidelity Investments.



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