

# Welcome to PenFinancial Credit Union

PenFinancial.com

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Let's face it. The financial world can be tough to navigate. With social media and the mainstream media constantly throwing out doomsday theories of the next market crash and the next 'buzzworthy' headline, it can be difficult to get past all the noise. But it doesn't have to be complicated!

I was born and raised in the Niagara region, so working for a credit union that is truly local and gives so much back into the community I grew up in is especially important to me. As a Wealth Advisor here at PenFinancial, I am committed to helping you achieve your financial goals by walking with you each step of the way. I will help you figure out what is most important to you, and set out a plan that will allow you to achieve those goals over both the short and long term. With my Certificate in Financial Services Advice and projected completion of my Personal Financial Planner (PFP) designation, I am equipped to help you with all your financial needs.

I am an active member of my community and have participated in events such as the Big Bike Ride for Heart and Stroke, Curl for Kid's Sake, and a partnership with Community Care promoting the value of RESP's in the community. Having given over 60 donations, I am also a big proponent of donating blood since there is a huge need and it's such an easy thing to do to give back to the community. We plan our days, weekends, weddings, vacations, etc but many don't plan for their financial futures. It's never too late to have a plan! Come visit me at either of our two locations in St. Catharines or at our Fonthill location. Easier yet, call me at 289 821-4417 or email me at [trevor.lagerwerf@penfinancial.com](mailto:trevor.lagerwerf@penfinancial.com) and let me help you feel good about your future.

## Trevor Lagerwerf

Wealth Advisor, PenFinancial Credit Union

Mutual Funds Investment Specialist, Credential Asset Management Inc.

Niagara Region

[Trevor.Lagerwerf@Penfinancial.com](mailto:Trevor.Lagerwerf@Penfinancial.com)  
289-821-4417



\*Mutual funds are offered through Credential Asset Management Inc.

### Fonthill

#### Fonthill Branch

130 Highway 20 East  
Fonthill, ON L0S 1E6

### Fort Erie

#### Garrison Road Branch

1201 Garrison Road  
Fort Erie, ON L2A 1N8

### Welland

#### East Main St Branch

247 East Main Street  
Welland, ON L3B 3X1

### St. Catharines

#### Bunting Branch

2-300 Bunting Road  
St. Catharines, ON L2M 7X3

### Niagara Falls

#### Dorchester Branch

7172 Dorchester Road  
Niagara Falls, ON L2G 5V6

#### Huggins Branch

6289 Huggins Street  
Niagara Falls, ON L2J 1H2

### Dunnville

#### Dunnville Branch

208 Broad Street East  
Dunnville, ON N1A 1G2

#### Fourth Avenue Branch

295 Fourth Avenue  
St. Catharines, ON L2S 0E7