



Financial Services

Phyllis Martin is a financial services professional with MassMutual Greater Houston, a general agency of Massachusetts Mutual Life Insurance Company (MassMutual). Phyllis is now working with Transtar members to help you achieve your financial goals*. Phyllis's normal hours in our offices are every Friday from 9 a.m. to 4 p.m. at the Williams Tower Branch on Level 20, and on Wednesdays from 1 to 5 p.m. at the 290 Main Office. Outside of those hours, Phyllis is available by appointment by calling her directly at 713-402-3850.

Phyllis has been recognized as a "Leader" for two years and a "Rising Leader" for three years. She received the honor of "Rising Star" from the Houston Association of Insurance and Financial Advisors. Phyllis is also a Certified Public Accountant** and is a past Chairperson of a Financial Committee and a former member of the Diversity Committee for the Houston Chapter of CPAs. She has also served on the boards of both the Houston and Texas Society of CPAs. She is a member and prior board member of the Houston affiliate of the American Woman's Society of Certified Public Accountants and a member of the American Society of Women Accountants. Phyllis was honored as a "Woman of Excellence" by the Federation of Houston Professional Women in 2007.

Planning for your financial needs is more than picking investments. It's about liquidity, risk management, retirement planning, estate analysis, tax minimization strategies, and more. Picking the right investments can help you achieve your goals - and your dreams. You can choose to work alone. Working with someone who knows the industry, who can offer tax reduction strategies, and who has access to other professional resources can be a real advantage in the pursuit of your goals. Transtar FCU provides its members access to comprehensive financial services in the Houston area through the financial professionals of MassMutual Greater Houston. Phyllis can help you with:

- Investment Planning
- Estate Analysis
- Tax Strategies
- Mutual Funds
- Retirement Planning
- Education Tuition Planning
- ROTH IRAs
- Life Insurance
- Disability Income Insurance
- Annuity Products
- Long Term Care Insurance
- Trust Services
- 401(k) / Pension Rollovers

*Products and services offered are not a Credit Union deposit or obligation. Not guaranteed by any Credit Union. Not NCUA-insured. Not insured by any government agency. May go down in value. Insurance is offered through Massachusetts Mutual Life Insurance Company (MassMutual) and other fine companies.

Phyllis Martin is a Registered Representative of and offers securities through MML Investors Services, LLC, Member SIPC (www.sipc.org). Supervisory Office: 3 Greenway Plaza, Suite 1800, Houston, TX 77046, 713-402-3800.

** Not practicing on behalf of MassMutual or MML Investor Services, Inc.

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Phyllis K. Martin is licensed to sell Insurance Products in: TX, PA Phyllis is licensed to sell Securities in: TX, MO
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