



January 2022 Edition

The Importance of a Yearly Financial Checkup



As a current servicemember or a Veteran, you understand the importance of maintaining your physical health. The military held you to certain standards when it came to strength and stamina, and just like your physical health, your financial health is equally vital.

[See what factors you should consider when conducting your yearly financial checkup.](#)

Trust AWM&T to Serve You for Life

Did You Know?

Assessing your Risk Number[®] empowers you to invest fearlessly.

Riskalyze is a financial tool that fills in the gaps between risk evaluation, analytics, and research.

AAFMAA Wealth Management & Trust is proud to offer this convenient tool to assess your risk and help plan your financial strategy. It's a simple questionnaire that utilizes quantitative data and maps out a retirement plan that is compatible with your needs, objectives, and risk tolerance.

[Click here](#) to get started.

Your Annual Policy Statement is coming soon.

Times and situations change. That's why it's important to review your annual statement and ensure the information is correct. We'll be sending yours to you soon. When you receive it, check these three things for accuracy, and be sure to make any updates as needed:

1. Policy Information: Verify that the correct name, address, phone number and email address are on the statement.

2. Policy Summary: Review the summary of your policy, premiums, costs, and activity (if applicable) to determine if your coverage level is still adequate for your needs and that your payments are on track.

3. Beneficiary Designation:



Much like tactical gear, money is simply a tool to protect you, serve you, and take you where you want to go. Each LES brought the potential for a financially successful future for your family. Today, having healthy, robust finances is mission-essential, and who you trust to manage your family's wealth matters.

[See how AWM&T can help with your family's financial strategy.](#)

143 Years of Service



AAFMAA celebrated its 143rd anniversary on Thursday, January 13, 2022. Our lasting success would not be possible without the enormous support of our AAFMAA team and Members like you who continue to [put your trust in AAFMAA](#) year after year.

We are grateful you continue to choose us to help ensure your and your family's financial security. We look forward to continuing to serve the military community for years to come.

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DISCLAIMER:

AAFMAA Mortgage Services LLC (AMS), Corporate Location: 1 Copley Parkway, Suite 420, Morrisville, NC

Ensure the beneficiaries listed are correct. If you need to make a change, please submit a new [Beneficiary Designation Form](#) or call our Policy Services Team at **800-336-4538** for assistance.

Military Mortgage Advisor Spotlight: Army Veteran Charles Skinner

After serving six years in the armed forces, Charles now uses his military experience to better serve Members from AAFMAA Mortgage Services LLC's Morrisville, North Carolina branch, assisting them with their mortgage needs every day.

[Read his story](#), then give us a call at **(844) 422-3622** to see how we can help you.



New Year, New You

Make the best of 2022 and all the years to come with these [6 New Year's resolutions for your whole military family](#).

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In Texas – CONSUMERS WISHING TO FILE A COMPLAINT AGAINST A MORTGAGE BANKER OR A LICENSED MORTGAGE BANKER RESIDENTIAL MORTGAGE LOAN ORIGINATOR SHOULD COMPLETE AND SEND A COMPLAINT FORM TO THE TEXAS DEPARTMENT OF SAVINGS AND MORTGAGE LENDING, 2601 N. LAMAR, SUITE 201, AUSTIN, TEXAS 78705. COMPLAINT FORMS AND INSTRUCTIONS MAY BE OBTAINED FROM THE DEPARTMENT’S WEBSITE AT www.sml.texas.gov. A TOLL-FREE CONSUMER HOTLINE IS AVAILABLE AT 1-877-276-5550. THE DEPARTMENT MAINTAINS A RECOVERY FUND TO MAKE PAYMENTS OF CERTAIN ACTUAL OUT OF POCKET DAMAGES SUSTAINED BY BORROWERS CAUSED BY ACTS OF LICENSED MORTGAGE BANKER RESIDENTIAL MORTGAGE LOAN ORIGINATORS. A WRITTEN APPLICATION FOR REIMBURSEMENT FROM THE RECOVERY FUND MUST BE FILED WITH AND INVESTIGATED BY THE DEPARTMENT PRIOR TO THE PAYMENT OF A CLAIM. FOR MORE INFORMATION ABOUT THE RECOVERY FUND, PLEASE CONSULT THE DEPARTMENT’S WEBSITE AT www.sml.texas.gov.

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