

How You Can Benefit

Support and strengthen the efforts of your credit union's investment team with portfolio services and tools offered by Alloya Investment Services. Our fixed income representatives evaluate your needs and then attempt to identify the most risk-appropriate security to help you achieve your investment objectives. As such, our mission is perfectly aligned with that of the credit unions we are working with. To put it simply, our clients' success is our success.

Alloya Investment Services delivers:

- Access – Alloya Investment Services clients gain access to practically all fixed income inventories, thus ensuring that your credit union sees all potential opportunities in the marketplace at the most competitive prices.
- Savings – Resources are aggregated, bringing high-value, cost-effective services to credit unions.
- Peace of Mind – Our investment experts are here to help your credit union find the right investment for the right reason at the right price.
- Precision – Analytics powered by leading-edge technology validate or enhance your investment decision-making process.
- Flexibility – Work with our investment professionals or execute investment transactions independently from our online investment management system, **Premier Portfolio**.
- Attitude – Our only priority is to help align your investment purchases with portfolio objectives.
- Empowerment – Allow us to reduce your workload while increasing your effectiveness.
- Support – Consider us your partner who works side-by-side with your team, or as an impartial third-party, to help you achieve results.

What differentiates Alloya Investment Services?

- We Know Credit Unions – We bring expertise, industry knowledge and an understanding of regulatory requirements to each interaction.
- Owned by a Corporate, Dedicated to Credit Unions – Alloya Investment Services is a subset of Alloya Corporate's wholly-owned CUSO. Performance-driven and value-focused, our teams are 100% dedicated to credit unions.
- We Always Have Your Best Interest in Mind – No pushy sales people here. Alloya

Investment Services holds no inventory (others do, so they have to sell securities that might not be right for you in order to offload inventory). Get the right bond for the right reason at the right price. Period.

- Not Any Solution; Your Solution - By studying the daily pressures faced by credit union financial officers, Alloya Investment Services developed highly relevant, effective investment services.
- Accessible to All - Services are available to all credit unions, regardless of asset size, geographic location or Alloya membership affiliation.

**Broker-dealer transactions are facilitated through ISI, member FINRA/SIPC.*