

What We Do

Put the talent, technology and tools of Alloya Investment Services to work for your credit union. As an extension of your team, we empower credit union decision makers to execute investment strategies with confidence.

Alloya Investment Services' broker-dealer services enable credit unions to choose from a vast array of Marketable Securities* and brokered certificates (SimpliCD Purchase) with the assistance of dedicated credit union investment professionals. Using advanced data management and screening tools, our investment representatives are equipped and dedicated to finding the most attractive investments and completing the transaction on a very timely basis. In essence, we are committed to finding the right bond for the right reason at the right price. As such, our agenda is perfectly aligned with our credit union clients' needs and investment objectives. To put it simply, our clients' success is our success.

For most of our clients, however, identifying attractive securities and efficient trade executions are only part of the process. We are committed to enhancing the risk management via an extensive suite of tools including in-depth investment accounting, best of breed investment portfolio analytics, and credit research. The introduction of **Premier Portfolio** - Alloya Investment Services' online investment management system - facilitates online trading and provides credit unions with easy access to key documents, monthly statements, and economic and market commentary all in one convenient location.

These value-add tools coupled with our total dedication to the credit union industry create the cornerstone of Alloya Investment Services - clearly delineating our organization from the traditional regional or Wall Street broker-dealer services.

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