

Invest

When faced with a multitude of investment choices, which selections are right for your needs?

Tap our experts as you would your own team. As unbiased consultants, we are here to help your credit union save time and effort, manage risk and enhance portfolio performance. Using advanced data management and screening tools we are dedicated to finding the most attractive securities for each credit union we work with. In addition to finding the right securities, we offer “best of breed” bond accounting, credit research and comprehensive fixed income portfolio analysis. These value-add tools and capabilities create tremendous operational efficiencies, save valuable time and enhance the overall risk management process.

Bonus: As a courtesy to your credit union, we can help you determine whether an instrument offered by another party is fairly priced. **Contact us** for further information.

SimpliCD Purchase

Loan Participations

Marketable Securities*

Rates

Subordinated Debt

** ISI-registered representatives facilitate broker-dealer transactions through ISI, member FINRA/SIPC.*