

# Marketable Securities

Put our experienced investment sales team to work for your credit union to identify suitable, risk-appropriate securities for your portfolio.\* We take pride in our partnership approach to understanding your objectives and return expectations, before locating specific investments. Credit union-owned, your success is our success – *literally*.

We have no conflicts of interest of selling “only” in-house inventory. Working with more than 50 positioning regional and wire house broker-dealers (B/D) throughout the country, we strive to identify the most attractive and risk-appropriate securities for our clients with the end goal of enhancing investment portfolio returns. In essence, we are committed to finding the right bond for the right reason at the right price.

And now with the added convenience of viewing a list of available securities online through Alloya Investment Services’ online investment management system – Premier Portfolio. Place “buy” order from the convenience of your desk to begin the security transaction at anytime from anywhere. To learn more about Premier Portfolio, visit [www.alloyacorp.org/invest-premier-portfolio/](http://www.alloyacorp.org/invest-premier-portfolio/).

**Log in to Premier Portfolio** to view a selection of marketable security offerings, posted daily!

## Save Time and Effort

Centralized for your convenience are thousands of regulatory-compliant investment choices, brought to you by a partner who understands credit unions.

## Enhance Effectiveness

We aggregate talent and tools to address both sides of your balance sheet. Risk/return analytics evaluate risk and value in the investment marketplace, delivering a best-practices approach to portfolio management.

## Strengthen Capabilities

Leverage our knowledge and skills focused solely on credit unions.

*\* All securities are offered through CU Investment Solutions, LLC. (ISI). The home office is located at 8500 W 110th St, Suite 650, Overland Park KS 66210. ISI is registered with the SEC*

*as a broker-dealer under the Securities Exchange Act of 1934. ISI also is registered in the state of Kansas as an investment advisor. Member of FINRA and SIPC. All investments carry risk; please speak with your representative to gain a full understanding of said risks. Securities offered by ISI are not insured by the FDIC or NCUSIF and may lose value. All opinions, prices and yields are subject to change without notice.*