

A top-down view of a white ceramic plate centered on a light-colored wooden surface. The plate is empty. The text "What's on your plate?" is printed in a black serif font in the center of the plate's well.

What's on  
your plate?

## Featuring

- Experienced Portfolio Managers
- Partner-in-Success Approach
- SEC-Registered Service
- Regulatory Knowledge
- Low, Fixed Cost

## Includes

- Portfolio Analytics
- Performance Reports
- Annual Policy Reviews
- Interest-Rate-Risk Modeling
- Investment Accounting Reports
- Investment Recommendations
- Board/ALCO Training

Managing an investment **portfolio** through such a difficult interest-rate environment is rigorous, **time-consuming** work. We can help. Designed with **credit union** financial officers in mind, **Advisor Assist** helps you optimize your portfolio's **performance**, fine-tune balance sheet management, and **strengthen decisions** with customized **analytics**. Your dedicated Advisor monitors your credit union's portfolio, ALM reports and policy-mandated risk levels. To help you achieve your **portfolio objectives**, this expert actively searches the markets, and taps an extensive **broker network** to locate suitable **products**.

Advisor Assist supports **your success**.  
We exist to **assist you**.

**Get started today.**

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## Advisor Assist

Cost-effective investment advisory service

Designed for credit unions with portfolios less than \$25 million

Expertise, tools and technology at a fraction of the cost to do it on your own

100% credit union-focused, credit union-owned service