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Allegacy Federal Credit Union Financial Advisors Named To Top 100 List

Winston-Salem, N.C., December 2016 – Three financial advisors with Allegacy Investment Group have been honored by *Bank Investment Consultant* magazine as part of the ‘Top 100 Bank Financial Advisors’ in the country.

The designation is to recognize the most successful bank and credit union advisors based on several key areas such as assets under management (AUM), 12-month production, yearly percentage growth and amount of fee-based business.

The top Allegacy Investment Group advisors include:

- **Tracy Duncan**, a CERTIFIED FINANCIAL PLANNER, professional (CFP ®) and CFS Financial Advisor with more than 16 years in the industry. He is based in the Allegacy Clemmons and Peace Haven financial centers.
- **Sam Critz**, a CFP ® with 12 years in the financial services industry. Critz is based in the Clemmons and New Jersey Allegacy locations.
- **Laura Banasiewicz** is a CFP ® with 31 years’ experience in the financial investment field. Her office is located in the Allegacy Peace Haven financial center.

“Every year, it gets harder and harder to qualify for the top 100 list, and I congratulate our team for the dedication provided when delivering investment services to Allegacy members,” said Steve Franke, program manager, Allegacy Investment Group. “We are honored to help our members achieve their best by providing excellent customer service, outstanding

investment knowledge, and building a true relationship to clearly define and achieve their financial goals.”

Financial Advisors at Allegacy Investment Group, available through CUSO Financial Services, LP (CFS) provide a wide array of services to individuals and businesses: including investment, retirement and retirement income planning, life and long-term care insurance as well as estate planning. For additional information, please call 336-774-3400 or visit online at www.allegacyinvestmentgroup.org

About Allegacy

For nearly 50 years, Allegacy has helped its members, employees and the communities it serves be their best by helping people make smart financial choices. By doing right, Allegacy has become one of the largest credit unions in North Carolina serving over 129,000 members worldwide with over \$1.2 billion in assets and an additional billion dollars in assets under management in its financial planning group. With roots in Winston Salem, Allegacy has 12 convenient locations and eight high school student-run credit unions in the Triad. Allegacy offers personal and business financial services to help a broad membership base including the employees, retirees and families of over 680 companies throughout the country be their best. To learn more, visit AllegacyFCU.org.

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*Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CFS: **are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union and may involve investment risk including possible loss of principal.** Investment Representatives are registered through CFS. Allegacy Federal Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.*