



FEDERAL CREDIT UNION

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Allegacy Investment Group Captures Two Top Honors with Gold Pacesetter and Keystone Awards

WINSTON-SALEM, N.C., February 14, 2024—[Allegacy Federal Credit Union](#)'s Investment Group recently was recognized with the CUSO Financial Services LP 2023 Gold Pacesetter and Keystone Awards for excellence and outstanding service in financial planning.

Gold Pacesetter Award

Allegacy Investment Group was named a Gold Pacesetter program, presented by CUSO Financial Services, LP, which represents an elite group of financial advisors that demonstrate “doing right” for clients through a compassionate and engaging financial planning process. “This distinguished team transforms the lives of our clients by teaching and empowering them to make smart financial choices, which improves confidence in their financial future, and enables them to focus on the people and activities that bring joy and meaning to their lives,” said Merrill Stewart, Allegacy’s Program Manager.

Individual members of the Allegacy Investment Group team were also recognized as 2023 Gold Pacesetters, including:

- Tracy Duncan – (supported by Jennifer Gibson and Natalie Denny)
- Tim Bowles – (supported by Karen Porter)
- Sam Critz – (supported by Jennifer Gibson and Natalie Denny)
- Laura Banasiewicz – (supported by Marty Motsinger)
- Ralph Miller – (supported by Pamela McCraw)
- Dan Bernabe – (supported by Pamela McCraw)

Keystone Award

CUSO Financial Services, LP’s Keystone Awards recognizes the top three credit union programs with the highest ratio of investment revenue per billion dollars of credit union deposits.

“It’s an honor for our team to be recognized for this award, as it shows our dedication to provide world-class financial planning expertise and experiences to our members,” said Steve Franke, Allegacy’s Chief Financial Planning Officer. “We regularly and proudly hear about the many ways our colleagues go above and beyond for those we serve.”

Non-deposit investment products and services are offered through CUSO Financial Services, LP ("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. The Credit Union has contracted with CFS for investment services.

These recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

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About Allegacy

For 57 years, Allegacy Federal Credit Union has helped its members, employees, and the communities it serves be their best by helping all make smart financial decisions. Allegacy is one of the largest credit unions in North Carolina, serving more than 173,000 members worldwide with \$2.2 billion in assets and more than \$1.5 billion in assets under management in Allegacy Investment Group, offered through CUSO Financial Services, LP. With roots in Winston-Salem, Allegacy has 19 locations across the Triad and Charlotte areas, and nine high school student-run credit unions. Allegacy offers personal and business financial services to its members, including the employees, retirees, and families of more than 5,000 companies throughout the country. To learn more, visit [Allegacy.org](https://www.allegacy.org).