



AVAILABLE THROUGH CFS*

CONTACT:

Karen Jarvis, Corporate Communications Manager

kjarvis@allegacy.org

336.406.5880

Allegacy Investment Group Awarded Kehrer Bielan Top Directors Award

Allegacy Investment Group's Steve Franke accepts award for top performing investment services provider

Winston-Salem, North Carolina, December 15, 2021 —Allegacy Investment Group, available through CUSO Financial Services, L.P. and led by Chief Financial Planning Officer/Program Manager Steve Franke, was awarded the Kehrer Bielan Top Directors Award for outstanding service.

The award is given to top performing providers of investment services at banks and credit unions in the United States. Using a data driven awards [methodology](#), Kehrer Bielan reviewed the performance of 406 banks and credit unions and selected an elite list of programs of varying sizes.

Franke was one of 71 investment services leaders recognized at a ceremony this week, where he placed 4th in the mid-size firms' category, sponsored by CUNA Brokerage Services.



“We are humbled to accept this award and thankful for the opportunity to serve our members with excellent financial care,” said Franke. “Our investment services approach is a comprehensive, personalized, and collaborative member experience. Our process is integrated into every member meeting and produces a formalized plan which may range from a 4-6-page to an 80-page plus report determined by the member’s personal situation.”

Franke’s team of advisors prepare and present holistic financial plans to at least 80% of all new members who utilize Allegacy Investment Group services. Plans are tracked and monitored monthly by each advisor.

“Financial planning is a core part of our member relationships and an expectation and engagement tool for our advisors,” said Franke. “Our advisors receive advanced training and are highly skilled at the execution of our process and I am incredibly proud of the work they do.”

---more---



AVAILABLE THROUGH CFS*

About Allegacy Investment Group

Through CFS, Allegacy Investment Group provides a wide array of options including investment, retirement and retirement income planning, life and long-term care insurance as well as estate planning. Started 24 years ago, Allegacy Investment Group now manages \$1.6B in Assets Under Management. For additional information visit online at www.allegacyinvestmentgroup.org

About Allegacy Credit Union

For 54 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 165,000 members worldwide with almost \$2 billion in assets and nearly \$1.6 billion in assets under management in its financial planning group. With roots in Winston-Salem, Allegacy has 16 locations and nine high school student-run credit unions. Allegacy offers personal and business financial services to help a broad membership base including the employees, retirees and families of over 1,800 companies throughout the country. More information is available at Allegacy.org.

###

*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.