



get the advice you
need to achieve your
financial dreams.

Learn how we can
help you improve
your overall financial
security — now and
in the future.

At Allegacy Federal Credit Union, we help you be your best by providing smart, affordable financial solutions and banking tools. It's a focus on your wellbeing, because we believe that a truly healthy life means having healthy finances.

It all starts with a smart financial partner committed to helping you reach your goals. At Allegacy Investment Group, we believe that by working collaboratively, we can make great things happen. Our Financial Advisors, available through CUSO Financial Services, L.P. (CFS)* will provide personalized support, helping you reach your goals and be your best through every stage of life.

Our CFS* Financial Advisors start with a comprehensive financial planning process. Our professionals will confidentially work alongside you to analyze your current financial situation, develop your goals and offer an objective, achievable plan that best addresses your personal needs and desires for the future.

Allegacy Investment Group is dedicated to providing you with sound financial advice as well as specialized products and services to help grow, preserve and protect your wealth. We offer assistance and guidance in the following areas:

PERSONAL FINANCIAL PLANNING

401(K) CONSULTATIONS & ROLLOVERS

RETIREMENT & RETIREMENT INCOME PLANNING

LIFE & LONG TERM CARE INSURANCES

ESTATE PLANNING & WEALTH TRANSFER

COLLEGE EDUCATION PLANNING

BUSINESS RETIREMENT PLANS

*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.

LET'S GET STARTED TODAY!

Call 336.774.3400 or email
investments@allegacy.org



AVAILABLE THROUGH CFS*