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## **Tracy Duncan Named Top Financial Advisor**

**Winston-Salem, N.C., January 12, 2018** – Tracy Duncan, a CFP® and CFS Financial Advisor at Allegacy Investment Group, has been honored by Bank Investment Consultant magazine as one of the ‘Top 100 Bank Financial Advisors’ in the country.

The ranking is designed to recognize the most successful bank and credit union advisors based on several key areas such as assets under management, 12-month production, yearly percentage growth and amount of fee-based business. Duncan ranked number 42 in the country.

Duncan has 28 years’ experience in the financial industry and has been a valuable advisor at Allegacy since 2001. He maintains his office in the Clemmons Allegacy financial center location.

Duncan has earned many accolades throughout his career including being inducted into the CUSO Financial Services, LP Hall of Fame which identifies inductees as an elite group of programs or individuals providing exceptional investment services.

“Because of our service-driven, not sales-driven culture, Tracy has developed many deep and meaningful client relationships which allows him to develop personalized plans,” said Steve Franke, program manager, Allegacy Investment Group. “Helping our members achieve overall financial wellbeing is one of Tracy’s many talents. We are proud of him for earning this Top 100 award.”

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 advice. For additional information, please call 336-774-3400 or visit online at [www.allegacyinvestmentgroup.org](http://www.allegacyinvestmentgroup.org)

### **About Allegacy**

For 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 more than 140,000 members worldwide with over \$1.3 billion in assets and an additional billion dollars in assets under management in its financial planning group. With roots in Winston Salem, Allegacy has 15 locations and eight 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 700 companies throughout the country be their best. To learn more, visit [Allegacy.org](http://Allegacy.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.*