




Investment Advisory


QuantyPhi and Corporate Central, through our partnership with Concourse Financial Group Securities, Inc., offers credit unions an Investment Advisory service to help reach goals of balance sheet optimization. Credit unions that understand the goal of optimization, but struggle finding the time to complete the work necessary, find this to be a useful option to reach the desired goal. Our experts specialize in providing balance sheet and investment advice and are registered with the Securities and Exchange Commission (SEC).


- Yearly Investment Benchmark
- Investment Security Safekeeping
- Monthly Investment Accounting
- Yearly Non-Maturity Share Study
- Two Yearly Visits with ALCO/Board of Directors
- Monthly Portfolio Update Call
- Additional Management Reviews as Necessary

Key Benefits

1. Discover, plan, and execute investment strategies in varying interest rate environments.
2. Reach your balance sheet optimization goals.
3. Get time back to focus on other tasks and job duties.
4. Our Investment Advisory service leverages the skills and systems available from QuantyPhi and Corporate Central to discover, plan, and execute strategies for durable results in many interest rate environments.

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