

# ADVISORY SERVICE

## Advisory Service Provides Objective Third Party Review, Plus a Dose of Reassurance

In Chris Clark's eyes, having access to an unbiased third-party opinion when it's time to invest is a benefit that can't be beat. As president of the \$80 million ANECA Federal Credit Union in Shreveport, Louisiana, Clark is referring to the expertise he receives from the Southwest Corporate Investment Services Advisory Service team.

The Advisory Service is an SEC-registered, comprehensive program of customized balance sheet solutions and integrated A/LM guidance from experienced industry professionals. Advisors perform detailed analyses of credit union financial conditions and work side-by-side with the credit union to make recommendations on balance sheet strategies. This all-encompassing service also provides A/LM modeling, portfolio analysis, investment execution, recordkeeping and ongoing guidance for credit union executive management, boards and staff.

A dedicated advisor works directly with the credit union to pair the most effective loan and investment vehicles with an optimal funding strategy that will enable the credit union to meet its financial goals. The credit union also has access to the full knowledge and skill resources of other members of the Southwest Corporate team.

***"Southwest Corporate goes above and beyond the call of duty..."***

"Our conversations confirm when it's time to pull the trigger on investments or when not to," Clark said. "The advisers tend to lean toward the conservative side, facilitating prudent decision-making within regulatory policies and guidelines."

ANECA welcomes the outside perspective of the Advisory Service. A third-party perspective eliminates



ANECA Federal Credit Union Shreveport, LA Total Assets: \$80,000,000

possible oversights that can occur when people are heavily absorbed in the details of financial management. Clark believes the advice he receives is more objective, too, because Southwest Corporate advisors do not operate on a commission basis.

"Over the years, I've worked with Southwest Corporate in different capacities. The last three or four years, though, I've been concentrating more on A/LM and the investment side of the financials, and I am very comfortable with the strategies they've provided," Clark says. "Southwest Corporate goes above and beyond the call of duty in this department."

In fluctuating economic and interest rate environments, Clark has the reassurance that Southwest Corporate is helping him monitor the credit union's earnings, liquidity and risk. "It's nice to know I have the Advisory Service team backing me up," said Clark. "With a third party agreement from them, I'm more comfortable with the decisions we make."

**Strong  
Solutions  
Together**



**southwest corporate**

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