The Credit Union Advisory Group at UBS

The global resources and local perspective credit unions need

With over 28 years of experience working with credit unions, the Credit Union Advisory Group understands the issues you face because we are dedicated financial professionals who focus specifically on serving your industry.

We're backed by the global resources of UBS. Our robust open architecture allows us to provide unbiased recommendations from a wide array of non-proprietary and UBS solutions.

Asset management and advice with no hidden fees
Our experienced team offers asset management, strategic advice and world class insights without any hidden fees.

The open architecture of UBS
With access to the firm's substantial inventory as well as the full range of products beyond UBS, we are free to find better insights and make recommendations based solely on your best interests.

Liquidity solutions
A detailed liquidity policy and contingency funding plan is an NCUA requirement. With a UBS Credit Line, you can pledge eligible securities as collateral for a loan instead of liquidating securities to meet your needs.

Your regulatory obligations
As a cooperative, not-for-profit financial institution, you require a partner who fully understands the regulatory compliance responsibilities you face, while also providing an efficient and cost-effective approach to anticipating and managing risk.

Safekeeping
In today's uncertain financial markets, risk-conscious credit unions require a stable provider of settlement and safekeeping services for their securities.

Gary Tantleff
Managing Director–Wealth Management

James Dill
First Vice President–Wealth Management

Theresa Carmagnola
Vice President-Wealth Management

Terry McMahon
First Vice President-Wealth Management

William Kurdyla
Senior Wealth Strategist Associate

Sheila M. Crowley
Senior Client Service Associate

Christopher Reicen
Client Service Associate

Cynthia Wagner
Registered Client Service Associate

Ashley Buhl
Registered Client Service Associate

The Credit Union Advisory Group at UBS
UBS Financial Services Inc.
184 Liberty Corner Road, Suite 101
Warren, NJ 07059
877-269-1776

ubs.com/team/cuag

Contact us today to learn more about our team and start the conversation.

UBS

The advantage of credit union expertise

Since 1987, the Credit Union Advisory Group's team of financial professionals has brought their considerable expertise and the global resources of UBS to credit unions of all sizes.

Principal, Gary Tantleff, has been recognized as the top Financial Advisor in New Jersey for 2013 and 2014 and listed in *Barron's* Top 100 Financial Advisors in the U.S. for 2012, 2013, and 2014. With average client tenure of 20 years, the team has built longstanding relationships by earning clients' trust through an open and sincere dialogue.

Our solutions and services include:

A wide array of credit union-eligible investments
- UBS and nonproprietary solutions
- U.S. agency securities
- FDIC-insured certificates of deposit
- Mortgage-backed securities and CMOs
- Municipal securities
- Liquidity solutions

24/7 performance reports
- Maturity schedules
- Cash flow reports
- Asset allocation
- Executive summaries
- Performance review

Customized reporting
- World-class economic analysis
- Interest rate shocks and horizon analysis
- Peer analysis
- Pricing and credit rating information
- Bloomberg analytics

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