



NEWS RELEASE

ALM First Financial Advisors Named Preferred Vendor by Achieva Merger Services

DALLAS (June 27, 2017) – [ALM First Financial Advisors, LLC](#) has been selected as a Preferred Vendor by Achieva Merger Services (AMS), a mergers and acquisitions consulting practice group in Dunedin, Fla. AMS was formed by Achieva Credit Union to help credit unions and banks determine appropriate merger partners, navigate the transaction and merge their operations. The firm will call upon ALM First for guidance when specialized financial knowledge is needed.

ALM First is a leading strategic partner within the financial industry, providing commission-free, fee-based services to more than 250 institutions across the country. The firm is an SEC-registered investment advisor, managing approximately \$20 billion in investments. As a Preferred Vendor, ALM First will offer its expertise in the areas of capital planning, loan due diligence and ALM modeling.

“ALM First’s primary goal is to help financial institutions maximize their returns. Many are interested in merging with suitable partners to more effectively compete in the financial arena, while also growing their market share and membership/customer base,” said Mike Ensweiler, ALM First Principal, Marketing and Client Relations. “It’s a privilege to work with a pioneering organization like AMS, and to offer our expertise as credit unions and banks consider their options.”

Achieva Credit Union made national history when it acquired Calusa Bank in 2015 – the first whole-bank acquisition of a bank by a credit union. AMS is led by Dennis Holthaus, Achieva Executive Vice President.

For more information about ALM First and its role as a strategic partner to financial institutions, call 800.752.4628 or visit www.ALMFirst.com.

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About ALM First

ALM First Financial Advisors, LLC is a leading, trusted strategic partner for financial advisory services. With approximately \$20 billion of investments under management, ALM First is an SEC-registered investment advisor. The firm provides commission-free, fee-based services to more than 250 financial institutions across the country. Since 1995, financial institutions have relied on our industry expertise in formulating strategies to manage risk and enhance return to help them manage their balance sheets and investment portfolios. For more information, call (800) 752-4628, or visit www.almfirst.com.

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