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Investment Services at Bay Federal Credit Union Announces Promotion of Emily Quatman to Assistant Vice President, Investment Services, LPL Financial Advisor

Capitola, CA — October 18, 2021 – The Investment Services at Bay Federal Credit Union team, located in Capitola, CA, has announced that Emily Quatman has been promoted to the role of Assistant Vice President, Investment Services, LPL Financial Advisor.

Ms. Quatman joined the Investment Services at Bay Federal Credit Union team in 2020. She has more than fourteen years of financial services experience, and was an Investment Advisor Representative at a large national bank for nine years. Over this past year, she stepped into the management of the Investment Services team with commitment, professionalism, transparency, and with the client experience at the forefront of her interactions.

"I am proud to be a part of this program at Bay Federal Credit Union," Ms. Quatman said. "I chose them as a partner because their philosophy of 'people helping people' and giving back to the community. Both align with my own personal values. I'm grateful for this opportunity to help build and cultivate deeper relationships with our clients than ever before."

"I am excited for Ms. Quatman and the Investment Services team. Over this past year, the program has grown by $75M in assets under management, and Ms. Quatman has been instrumental in this success.," said Tonée Picard, EVP, Chief Development Officer and LPL Program Manager. "Ms. Quatman's main focus is to deliver on the promise of making a real difference in the financial lives of our clients, and I know her commitment to providing an outstanding client experience will help those in our community understand and pursue their financial goals."

Ms. Quatman attended school in Texas and Ohio, but after an early-morning walk on a Santa Cruz beach on vacation, she decided to move to the area permanently in 2009. She is a proud resident of the San Lorenzo Valley. In her free time, she enjoys spending time with her husband, daughter, and pets. She loves spending time outdoors with family, whether they are hiking in the redwoods, walking along the beach, or camping in the sequoias.

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**Source: 2018/2019 Kehrer Bielan TPM Survey. Based on Financial Institution Market Share.*

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†Based on total revenues, *Financial Planning* magazine, June 1996-2020

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