#### ALM First Surpasses $55 Billion in Assets Under Management

#### For Immediate Release:  May 3, 2021 Contact: Sharon Simpson, (240) 620-4095 or [sgsimpsonconsulting@mac.com](mailto:sgsimpsonconsulting@mac.com)

**Dallas, Texas** – ALM First, a strategic partner for more than 300 financial institutions nationwide, recently surpassed $55 billion in assets under management.

As depositories continue to seek more competitive investment options for their excess liquidity, savvy investment managers have turned to actively managed strategies, such as ALM First Financial Advisors’ four distinct portfolios: Core Spread, Cash+, Enhanced Liquidity, and Investment Grade Credit.

“For more than a quarter-century, ALM First has been putting our clients’ best interests first, allowing us to deliver the unbiased advice that is so critical for depositories to perform at a higher level,” said Emily Hollis, CFA and CEO of ALM First. “When the institutions we serve earn more on their investments, increase internal efficiency or improve their overall balance sheet management, their communities and key stakeholders benefit from the enhanced value created. It’s an honor for us to play a role in that value creation.”

ALM First’s Investment Management Group offers deep market experience and focuses on producing results. Each fixed income strategy portfolio is managed to a specific mandate based on clearly defined goals and risk parameters. The Core Spread Portfolio strategy targets a duration of 2.25-2.75%. The Cash+ Portfolio strategy targets a duration similar to a 3-month Treasury bill. The Enhanced Liquidity portfolio strategy targets a duration similar to a 9-month Treasury bill. The Investment Grade Credit strategy focuses on investment grade credit in the 1-5 year area of the yield curve.

Beyond investments, ALM First’s team of experienced professionals provides a host of strategic services and balance sheet management solutions including the Loan Transaction Network, Merger & Acquisition Advisory, Mortgage Pipeline Hedging, Strategic Net Worth Analysis and more.

Visit [www.almfirst.com](http://www.almfirst.com) for more information on the four fixed income strategy portfolios and to learn more about our ongoing partnership options.

**About ALM First**

ALM First is a strategic partner for depositories, offering an array of financial advisory services. Since 1995, our expertise in asset/liability management, fixed income portfolio management and hedging, has allowed us to deliver deeper insights into financial institutions’ balance sheets, strengthening their financial performance and building efficiencies. With more than $55 billion of investments under management (as of March 31, 2021), ALM First Financial Advisors is an SEC-registered investment advisor, acting as an unbiased third party, offering commission-free, fee-based services to over 300 financial institutions across the country.

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