



ALM First Caps 30th Anniversary Celebration with Impact Report

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Dallas, TX – ALM First, a strategic partner to over 450 depositories nationwide, closed out its year-long 30th anniversary celebration with the release of its Impact Report this week. A culmination of the past year's celebration, the report highlights the firm's measurable impact on the industry in 2025 along with the core values and long-standing commitments that have guided ALM First for the past three decades.

ALM First was founded in February of 1995 and kicked off its 30th year of service celebration in February of 2025. Together with its clients, and through expanding collaborations and partnerships, the firm is making a positive difference for community financial institutions.

"The past year has truly been a milestone for ALM First, marking 30 years of service to our clients and the overall industry," says Emily Hollis, CFA and CEO of ALM First. "Our combined impact has never been more important and we're proud of what we've been able to accomplish with our clients' trust and support."

From providing professional education opportunities that reached 1,949 financial professionals to ALM First experts traveling to 44 states in 2025 for industry events and speaking engagements, ALM First's industry impact is clear.

ALM First also demonstrated its ongoing commitment to community-based organizations and their charitable causes with \$24.2 million in client investment returns generated for charitable purposes last year alone.

The full 2025 Impact Report may be viewed [here](#).

More information about ALM First's educational opportunities, partnerships and other industry involvement may be found at www.almfirst.com.

About ALM First Group

ALM First was founded in 1995 as a strategic partner for depositories, offering an array of financial advisory services. The firm's expertise in asset liability management, investment management, balance sheet strategy, secondary market solutions, and specialty financial services, has allowed it to deliver



deeper insights into financial institutions' balance sheets, designed to support and building efficiencies. With approximately \$77 billion of investments under management (as of December 31, 2025), 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.

In recent years, ALM First Group has expanded to include several wholly-owned subsidiaries including DDJ Myers, an ALM First Company and ALM First Executive Benefits, LLC. Driven by client needs, the firm now offers various services to help financial institutions optimize their greatest assets – their people.

"ALM First" is a brand name for a financial services business conducted by ALM First Group, LLC ("ALM First") through its wholly owned subsidiaries: ALM First Financial Advisors, LLC ("ALM First Financial Advisors"); ALM First Advisors, LLC ("ALM First Advisors"); and ALM First Analytics, LLC ("ALM First Analytics"). Investment advisory services are offered through ALM First Financial Advisors, an SEC registered investment adviser. Access to ALM First Financial Advisors is only available to clients pursuant to an Investment Advisory Agreement and acceptance of ALM First Financial Advisors' Brochure.

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